

A Day in the Life of a Donation

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Agenda

- Track a donation from start to finish
 - Identify delays/bottlenecks in process
- Determine pain points that need to be addressed

Donation Comes In

1. Donor comes to know of AID

- Don't track how he/she came to know of AID
- Chapters don't get most up-to-date donor lists
- Need AID-wide mechanisms to get repeat donations

2. Donor decides to donate

- (a) One time/periodic contribution through check
- (b) One time/periodic credit card donation

3. Problems with 2:

- Must have pledge form required content
- CC Pledge form needs to be mailed for processing at HQ
- No way to track check periodic pledges
- Need to track expired credit cards/address changes

Chapter Sends Checks/Pledges

4. Chapter must ensure address on check is correct
 - If not, receipts bounce
 - Chapters must conduct address refresh annually
5. Chapter treasurers pay out-of-pocket for postage:
 - Bunching checks delays processing
 - Bunching increases postage costs
 - . priority/tracked mail
 - . bulkier package
6. Certified mail requires zone to retrieve mail during office hours - more delay
First class mail may get lost
7. Donations sent to wrong zone:
 - With PeachTree, zone had to redirect - delay
 - Separate database in each zone - couldn't crosscheck matching donations

Zone Gets Checks

8. Zone does check entry into database - big bottleneck

9. Treasury system has changed twice this year:

- Login problems
- Confusion

10. Multiple databases to track donor contact

- Have to update two databases if address changes
- Difficult to determine which address is latest

11. If donor already in database but in different zone

- Redirect donation - big delay
- Request HQ to change donor's zone - huge delay

12. Matching Donations:

- Form needs to be filled by zone
- Zone needs HQ authorization
 - . Need reauthorization since HQ address changed
 - . Need reauthorization for incorporation
- Zone cross checks that donation was made
 - . Can't do for periodic credit card contributions

Matching Donations

- Zone tracks matching donation form copies
- When matching donation arrives:
 - Cross check against donations - periodic CC problem
 - Matching donation arrives at wrong zone:
 - . Cross check w/ all zones
- Zone complies w/ request for additional info. - delay

Sync

- Mechanism to merge three databases into one
- Supposed to be done once every two months
- Supposed to last for a weekend
- Zones locked out of check entry during sync
- Typically done once in six months
- Takes several weeks to do
- Typically doesn't include CC contributions
- Typically doesn't include common pool deductions
- Sometimes doesn't include appropriations
- Can't do chapter accounts until after sync
- Global view of AID finances is upto 6 months old
- Sync typically done at crunch time - before taxes

Credit Card Contributions

- Helping.org (now called NetworkforGood.org):
 - immediate charging of card
 - immediate receipt issued by Network for Good
 - one time contributions
- Periodic:
 - Software at MD
 - Single point of failure:
 - . multiple charges
 - . inability to stick to monthly cycle
- Chapters need to track Jitin's reports on periodic CC
- Bulk credit to PeachTree - don't know which chapter gets what
- CC donors not entered into mailing database
- Need to actively manage expired CC

Chapter Accounts

- Project reversals have to manually be accounted for
- Project database and treasury database don't show same disbursements
- Credit card donations don't appear
- Don't know how much common pool contribution to deduct manually
- Can get an accurate picture only after sync
- Don't have AID wide view
- Income tracked at zone, appropriations tracked by HQ

Fundraiser

- Sandeep has been very good about this
- Main bottleneck: getting event account in database
- Appropriations from HQ and petty; revenue to zone

New Chapter

- Need zone assignment
- Need chapter account
- Need chapter code

Summary

- HQ still has a lot of responsibility
- Zones are becoming bottlenecks
- New legal compliance requirements will add burden
- System doesn't scale w/ new chapters and more fundraisers
- Problem more acute for emergency situations, e.g., EQ
- Distributed database problems
- Need more training in procedures, better documentation
- Donor relations suffering big time