



Optimizing Client Communications and Distribution

www.tgidirect.com • 800.337.2237

Case Study | Industry: Non-Profit, Education and Training

Donor Gift Receipting & Pledge Reminder System



The new donor gift receipt and pledge reminder system saved the client both time and money.

OBJECTIVE:

The client, a major top 10 university, was unsatisfied with their current donor gift receipt and pledge reminder system. The system, which relied on a manual process, demanded too much of their staff's time in the Gift & Records Department, and only used printed receipts that were mailed to donors. The client wanted to develop a new system that streamlined the process and incorporated print and/or email distribution. They needed a web portal that gave staff members more control over and better access to the receipting process. The new system also needed to match their new vendor's format and better reflect the university's branding efforts.

STRATEGY:

TGI Direct created a custom record management system and developed a new gift receipt format for the client that improved the process from beginning to end. The new system automated branded distribution with email receipts for most donations, but still allowed printed receipts when needed. This improved turnaround time and gave the staff more flexibility when dealing with specific donors.

The new system also created a data archive for all receipt data and images for six years, to ensure tax law compliance with all data saved as PDF files in the seventh year. TGI Direct also created annual year-end receipts which include an enumeration of all contributions made during the calendar year and the designation of each gift. The university was better able to serve its donors' requests for past donation records and the archive provided a richer source for donation trend analysis.



RESULTS:

The new system saved the client both time and money. The client was able to automate a previously totally manual process and converted a legacy gift management system into a new and exciting fund raising platform. Receipts that were previously printed and mailed out are now delivered instantly via email. The web portal designed by TGI Direct streamlined the entire receipt process, greatly improved data reporting and provided a single-source for staff members to look-up and re-issue receipts. The client saw a 25% savings in printed materials and a 40% reduction in postage costs. Because of the success of the receipting program, weekly and monthly pledge reminders were added into the process. The new system increased receipt and pledge reminder distribution time by 400%.