

Fundraising rollout

Keeping donations processes simple can be a challenge but with DevMan as your centralised system and an accompanying roll out strategy, donor needs and organisational requirements for Fundraising can be met.

This guide, which follows a tried and tested phased approach, is designed to set up your systems as quickly as possible with minimal disruption and impact on productivity.

Step 1 – System setup and imports

System value is enhanced by acquisition of any information available, especially existing donors and their donation histories. Steps include:

- DevMan team to provide import specification document
- Client to source data, possibly including:
 - Donors, prospects and other stakeholder lists
 - Donation history
 - Funding projects with their associated management structures
- DevMan team to import data
- DevMan team to assist the client in setup of core donor profiling settings (sector, focus areas, interests etc.) and donor stewardship procedures (birthday SMS, organisation application date reminders etc.)

Step 2 – Stakeholder engagement (core CRM)

A series of introductory training sessions useful for all users, covering the following areas:

- Adding, searching, viewing and updating donor, prospect and other stakeholder profiles
- Searching for groups of stakeholders (per sector, region, focus area, amount donated etc.)
- Recording interactions (visits, phone calls, emails etc.)



Step 3 – Fundraising

DevMan provides a complete set of tools for the fundraising cycle. Setup and training will cover:

- Project management, including assistance with setup of hierarchical reporting structures for recipients of donor funding (departments, faculties, business units etc.)
- Prospect profiling
- The approach cycle, from prospect identification through to proposal submission and monitoring
- Donor reporting including interval, communication requirements and progress report workflow

Step 4 – Financial management

The goal is to streamline all donor related financial management via DevMan. Each financial process may require import of legacy data, workflow process definition and setup, implementation and training. Areas can include:



Once-off donations

These donations are typically captured on DevMan by a finance user and an acknowledgement sent to the donor. Rollout steps include:

- Client to define communication protocols based on target audience, donation value, signatories and related criteria, and whether these can be automatically generated or require manual user intervention
- Client to provide acknowledgement wording for each medium (print, email, SMS etc) and each specific rule.
- Finance users to receive training in donation data capture, acknowledgement and communication monitoring.

Regular giving

Maintaining your regular givers via DevMan's committed giving module provides many benefits, including reduced administration via monthly bulk procedures, automation of the donor stewardship process and income forecasting. Rollout includes:

- Client and DevMan team to review each regular giving channel in use (eg credit card, debit order, mobile short code) and assess integration viability. (See separate Integration section if integration is viable).
- Client to provide commitment records for import (donor, project, amount, interval, start date etc).
- DevMan team to import data and implement donor stewardship workflow.
- Finance users to be trained in maintaining committed giving plans, bulk donation generating, handling failures and exceptions, and monitoring via the dashboards.

Donor pledges / Invoicing

Some fundraising institutions need to generate invoices for corporate donors before the donation can be given. DevMan can produce these invoices with unique numbers for the donors:

- Client to provide DevMan team with invoice template and last number of invoice
- DevMan team to create template
- Client to sign off template
- DevMan team to train client on generating invoices

Tax certificates

Unique tax certificates can be generated per donor for tax return submissions:

- Client to send DevMan team the tax certificate template and the next tax certificate number to be generated
- Client to verify signatory rules (e.g. CEO signs if donation is > R1m) based on the donation amount and to be set up by the DevMan team
- DevMan team to add tax certificate template to DevMan
- DevMan team to train client how to create and print once off tax certificates and batches of certificates for financial year end

Step 5 – Training on management reporting

Analysing all areas of the database to assist with the client's business intelligence.

Training will cover:

- Building customised reports
- Producing customised exports
- Using the dashboards



Step 6 – Training on communications & events

DevMan provides a complete set of tools for managing subscriptions, bulk mailing and events. Training will cover:

- Managing subscriptions and mailing lists
- Newsletter template design
- Sending mailshots
- Event setup and management of the invitee list
- Sending event invitations with online RSVP
- Tracking attendees and event reporting



Step 7 – Rollout for integrations

DevMan is an integrated and connected solution that 'talks' to many core administration, finance and communication systems and a growing suite of online services.

Potential areas for integration include:



Debit orders

Debit order payment processing is a service typically outsourced to specialised financial service providers and banks. DevMan currently integrates to LinkServ, a popular service provider in the electronic payment space, as well as various South African and European banks.

Online giving

Today's growing e-commerce market has raised the demand for secure payment mechanisms, and is proving to be a popular option in the fundraising sector. DevMan currently integrates to Virtual Card Services (VCS) and PayGate.

Accounting

Reduce data capture pressures and create a single source of truth by streamlining data transfers between DevMan and your accounting software.

DevMan integrates directly to Sage Pastel, and supports API's to various other financial solutions.