

# DocuWare Earns High Grades from University Fund Raisers

*Nestled in the heart of “Big Sky” country, the University of Montana draws 15,000 students a year to its Missoula, Montana campus. The University of Montana Foundation is an independent non-profit organization that works hand-in-hand with the University to increase philanthropic support and ensure continued excellence, access and affordability. The Foundation raises funds, builds and maintains relationships with alumni and friends and manages an endowment where earnings provide ongoing support for the University.*

## **Initial Situation**

The Foundation needed a better way to manage and share important documents, as well as transform their paper-based donor files into a database of searchable information. With its current staff, the *Foundation* was sinking in a sea of never ending clerical duties that was taking away from their focus of raising funds.

## **Requirements**

They wanted to regain office space by removing paper filing cabinets and implement a solution that made it easily searchable, available to remote staff, and most importantly, that could integrate with the University’s higher-education ERP software, Banner by Ellucian.

## **Solution**

The Foundation chose to implement DocuWare because it could easily be customized to meet their exact document management needs and it was able to seamlessly integrate with their ERP software. Authorized DocuWare Partner, J&H Inc., worked with the Foundation to develop a comprehensive solution and indexing criteria.

Today, when the staff logs in to their ERP system to review a gift, they simply highlight a gift number and DocuWare works in the background to pull up all documents indexed with that gift number, giving the staff instant access to all relevant source documents. Pre-defined access rights set up within DocuWare are used to manage and control, which employees have access to sensitive information.

## **Benefits**

The organization can be more focused on fundraising rather than spending time photocopying, filing and physically storing paper documents. The Gift Processing team can quickly track their information now that it is all stored electronically in DocuWare. This includes documents such as handwritten notes, forms and even a scanned image of a donation check. Index terms for these documents are uploaded in batches to the Foundation’s ERP system, booking the gifts and simplifying records management.

The Fund Administration team uses DocuWare to store all forms and correspondence related to a fund as well as gift agreements that detail how the University will use each donation, as well as endowment and scholarship reports.

“With the integration of DocuWare with Banner, verifying that gifts are used according to donor wishes is much easier because our records are simple to find and source documents are easy to access,” said Amy Heller, Director of Donor Relations for the University of Montana Foundation.

The Foundation manages almost 900 endowment funds. They work with a third party vendor to create and mail an annual financial report to each endowment founder. Instead of spending weeks, copying and filing the reports, DocuWare allows them to quickly store a PDF of each report electronically. Nearly 1,000 scholarship recipient reports follow this same process.

“We are the steward of our endowments. Storing a copy of the information that was sent to our donors is a crucial part of our responsibility to ensure that their gifts are being used as intended,” said Heller.

Donor and potential donor information from University publications, land records, media clippings and a variety of other sources have been scanned and archived in DocuWare, indexed by date, first and last name and Banner ID. Each donor prospect file contains different documents. However with DocuWare, the Prospect Research staff is able to electronically flip through the documents much faster and perform a full text search, dramatically increasing the effectiveness of one of the Foundation’s larger databases.

The Foundation’s Development Officers, or front line fundraisers, are not housed centrally but embedded within the different colleges at the University. Today, they can access the prospect research database anytime, especially before a weekend fundraising event.

“DocuWare holds so much information, it acts as our ‘institutional memory’, by maintaining all records of gifts and donor involvement over the years. The combination of detailed gift information and secure, accessible storage for gift agreements gives both our operations and development staff rapid self-service access to key information. This has greatly improved our ability to deliver timely service to our constituents, and increased the efficiency and the accuracy of our work,” said Art Held, Vice President of Development Services.

### **Conclusion**

Before implementing DocuWare, the Foundation was physically handing each document three or more times throughout its workflow. With electronic processing in place, this is no longer the case and the Foundation has seen a dramatic increase in its operational efficiency.

“Prior to DocuWare, our information was often days of research away. An analysis would show that we have more than paid for our DocuWare solution with the time savings we’ve realized,” said Held.

In conclusion, DocuWare has proven to be an essential tool that helps the University of Montana reach its goal of raising funds to enhance the student experience, improve academic programs and athletics, and enrich the culture and community of the campus and Missoula.

-----Bulleted Lists-----

**Tasks**

- Regain office space and remove file cabinets
- Move documents to a digital archive and reduce clerical duties
- Create a searchable database available to remote staff
- Integrate a document management system with the ERP system

**Benefits**

- Better utilization of staff for fundraising activities
- Onsite and remote, employees have secure, easy access to information
- Developed a robust searchable database
- Developed a long term institutional memory
- Increased operational efficiency including office space utilization

**University of Montana Foundation**

**Industry:**

Education, Non-profit

**Location:**

Montana USA

**Application:**

Donor Management, Records Management and Gift Processing

**Document Types:**

Donation forms, gift agreements, stock transfers, checks, hand written notes, research documents, endowment reports, scholarship recipient reports, letters and emails.

**Quote**

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