9 Steps to Your Smoothest December Yet
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Despite the warm weather and summer vacations lulling us into the belief that December is still in the distant future, as every gift processing team member knows, it is never too early to start planning for the end-of-year onslaught of gifts.

According to the results of a Bentz Whaley Flessner benchmarking survey of over 15 institutions across the nation, over 30 percent of gifts come in during the last few months of the year. While this significant increase is highly rewarding for institutions, the sheer volume causes complications for the hard-working operations teams in the back office who are responsible for entering and processing donors’ generous contributions.

This influx of end-of-the year gifts also significantly impacts donor acknowledgement turnaround time. The same BWF benchmarking survey indicates that during the busiest weeks, it can take from 5 to 7 days to transition a gift from intake to receipt and acknowledgement. This lag falls short of industry standards and the best stewardship service institutions can provide its donors.
So how do we prepare our donors, fundraising staff members, and gift processing teams for the end of year rush? Here’s how to get from September 22 to January 1.

1. **Think ahead.**

In order to be ready for December, it is important for everyone—from leadership to staff members—to fully comprehend the time commitment and steps necessary to surmount end-of-year obstacles. Create an outline of all the work that must be completed before the end-of-year rush. Ensure that all data append projects, such as NCOA, are updated in the database to assist with smoother gift entry. Also, confirm that the gift processing calendar incorporates drop dates of direct mail so that the team can more accurately estimate and prepare for when donations will arrive in the door. Additionally, ensure that post office delivery continues throughout the days the institution is closed or partially closed, especially if your institution relies on a third party, such as campus mail.

2. **Assess your current processes.**

With the increase in end-of-year volume on the horizon, it also critical to assess and transition from the standardized and detached roles within the gift processing department to a better integrated and aligned approach.

Examine your recent processing times, control reports, and related QA investigations. What specific types of gifts or processes have caused the greatest bottlenecks? What is a time-consuming manual process that could be streamlined through the use of technology or automated tools? What training, resources, or intra-departmental communication could be focused on those areas to resolve this overflow?
3. **Adjust processes accordingly.**

Once you have a thorough understanding of the current processes and technology that cause gift processing staff the most issues, determine what concerns will be tackled and in what manner. Generally, opportunities for improvement exist at all steps along the gift processing workflow:

**Intake:** Prioritize by gift amount and constituent type to ensure high-touch donors are most immediately processed.

**Batch:** Batch assignments should be made by close of business daily to ensure selected work is scheduled at start of next business day. Older batches should be completed first.

**Entry:** Incorporate tools, such as remote deposit capture scanning or barcodes to improve efficiency.

**Finalize:** Use automated data entry standards and batch template functionality within your database of record to decrease errors and lessen the need for QA processes on the back end.

4. **Establish a communication plan for donors.**

It is important to remember that this time of year is also a busy one for your donors; and, therefore, donors should not be met with additional confusion or stress when attempting to contribute to your institution. Ensure that all intake methods are streamlined and incorporate a notification to answer common donor questions, including inquiries about unusual gift types such as stock transfers or gifts in kind.

Consider working with direct mail partners to include a “year-end giving tips” on the reply form for certain giving levels so that donors are adequately informed. Additionally, you will want to provide contact information for off hours in case a request comes in during official holiday breaks.

5. **Work with fundraising partners.**

While gift processing may be the hardest hit area, it is not the only department dealing with this year-end onslaught. Key partners must be alerted to the repercussions of higher than usual gift processing numbers, which could have a notable downstream impact for the finance and major giving departments.
It is imperative to let all key partners know what to expect so that donor service is not compromised. Ensure transparent communication via the following steps:

- Craft an end-of-year reminder to alert all staff to gift acceptance policies and contact names for gift processing needs. Make sure to include pertinent dates, hours, and locations where donors or staff can drop off gifts. Send the first reminder communication in the beginning to mid-October.

- Make sure staff members know how to handle gifts that are delivered to their offices. Ensure staff members keep envelopes and all other documentation received from donors that might indicate instructions about the gift as well as what year the gift should be receipted. If feasible and necessary, consider adding or increasing the schedule of a runner who will make gift pickups around the institution to ensure timely returns from far-away offices.

- Maintain open communication with development officers regarding the length of the gift processing backlog in case they receive calls from donors. Provide troubleshooting and related service if a development officer needs information in these instances.

6. **Staff member bandwidth.**

One of the most important steps to take when planning for the end-of-year rush is establishing a schedule for gift processing staff coverage during the holidays. Despite the custom practiced by many institutions to close or be partially staffed during the weeks between Thanksgiving and New Year’s, gift processing work must continue during these off hours. In order to ensure comprehensive coverage, consider creating a matrix to track and delineate who is responsible for what tasks during what days. Determine if adding metrics, such as a goal of number of gifts to complete each day, would be a useful tool for your team. If your institution moves forward with these metrics, plan early with staff so that appropriate expectations are made, and team members can enjoy their holidays.

7. **Backup plan.**

Undoubtedly, no matter how well your institution plans for the end-of-year gift processing rush, there will be unexpected events and obstacles that cannot be predicted. However, this does not mean you cannot prepare a carefully crafted “Plan B,” which outlines how you will address unforeseen difficulties.

- Ensure you have a least one back-up staff member “on call” if someone is out of the office. Cross-training of your staff is especially important for the success of this back-up. If your staff is trained solely in one process, the likelihood that they will be effective as “on-call” staff members decreases.
Confirm that all staff, both within gift processing and within development, have the contact name and contact details of the individual who will be the point of escalation when leadership decision-making is needed.

Make sure your institution’s online giving page is working throughout the holiday season, and have an IT individual on call to troubleshoot any issues.

8. **Backup plans C-Z.**

Despite any institution’s best laid “Plan B,” there is a need to strategize for not only the unforeseeable but the “one-in-a-million” circumstances. One such event is the disastrous effect that a winter storm can have on a team’s ability to process gifts. Have you made back-ups of your data? Do you have contingency plans for gift processing and receipting if inclement weather leaves your office without power or with staff members unable to make their way into the office? Does your third-party vendor (i.e., caging facility) have a contingency plan for when they are faced with winter weather?

9. **Remember to celebrate.**

You’ve made it through the end of year gift processing rush, but now what? Take time to congratulate your gift processing team, your development partners, the IT team (and others) that helped you over weekends and evenings, and most importantly, your donors. A variety of individuals made it possible for your institution to make it through this challenging time; make sure they feel appreciated.
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