SAMARITAN'S PURSE AUTOMATES GIFT PROCESSING WITH EZESCAN

▶ **About Samaritan's Purse Australia**

Samaritan's Purse Australia (SPA) is a non-profit, Christian organization providing emergency relief and development assistance to suffering people around the world. Samaritan's Purse is meeting the physical needs of victims of war, famine, natural disaster, poverty and disease with the aim of demonstrating God's love and sharing the Good News of Jesus Christ. The aid and assistance are given without regard to the race, creed, gender, religion, or ethnicity of the beneficiaries.

▶ **The Challenge**

Processing 300,000 Shoebox donations (gift-filled shoebox) in a month was a major challenge to the financial and administration operations of SPA.

Within Operation Christmas Child (OCC), the issues of funds being banked, receipts issued, accounts completed and reports sent out for what was normally a year's worth of work needed to be completed in a one-month period.

The Warehouses of SPA - located throughout Australia process and provide the distribution for the Operation

Photo courtesy of Samaritan's Purse Australia

Christmas Child (OCC). At present, the warehouses process over 300,000 Shoeboxes for the underprivileged Children in Southeast Asia - all of which are collected in the month of October and have been a challenge to the financial and administration operations of SPA according to Ann Brombal.

> *"Over the years we have tried to streamline and develop processes to have funds banked, receipts issued, accounts completed and reports sent out within a month. This is equivalent to a year's worth of work required to be processed within a one-month period."*
>
> *Ms Brombal*

Phase one of the streamlining occurred three years ago when SPA outsourced the donation envelopes received for OCR Scanning to a Bureau. This helped to reduce the work load for data entry, speed up credit card processing and have the data imported into their fundraising software (The Raiser's Edge) as quickly as possible.

The next phase for SPA was to go paperless. This involved importing the scanned images onto the SPA Server to hold for audit purposes or if a donor had a query. Unfortunately, phase two encountered several problems with the outsourced scanning provider - including bad data and issues with compliance with the merchant facility & the Tax Office.

Other issues associated with the outsourced scanning provider included:

- Tracking the credit card if it was declined or invalid and loss of Donation Forms
- Scanned donation forms being scanned into the wrong batch, giving wrong batch totals and poor image quality that made it inefficient for identification purposes
- Credit Card donations were not processed for up two weeks after receiving the donation

An overall loss of confidence in sending out the donation forms to the outsourced OCR provider for fear of loss of Donation income for the credit cards.

▶ The Solution

"In 2014 I was invited by another NFP Organization to review a scanning application that they had implemented and was providing real efficiencies. I was so impressed with what was being presented to me. EzeScan was the solution we had been looking for, it had a lot to offer and its close integration with The Raiser's Edge was very impressive." said Ms Brombal

"What really impressed our organization was the credit card redaction, as this was a very big issue that needed to be resolved for Samaritan's Purse. We needed to stay compliant with the Bank and the Tax Office as we could not hold donations forms in the cloud with the credit card number showing. " said Ms Brombal.

Photo courtesy of Samaritan's Purse Australia

A key objective for SPA is becoming totally paperless, with the EzeScan solution this means we can hold the credit card donation batches in the cloud. SPA were also impressed that all scanned donation forms could be stored on the individual Donors constituent record in a folder using a simple plugin. This meant for SPA when a donor called and you needed to see the image you could use quick find in The Raisers Edge software to view the image scanned.

▶ The Results

In September 2014, EzeScan went live with scanning queues created to reflect the Donation envelopes and slips required for all information that was needed to be captured into The Raiser's Edge for receipting & reporting. By using self-populating fields and having the ability to skip fields if not populated by the donor has minimised the number of operator key strokes. Static fields were created on the templates for the donation slips and then automatically applied. This saves the operator having to manually enter data for each field within the donation slip.

Separate scanning and processing queues were developed to allow scanning to continue uninterrupted and at the same time allowing other users to clean and import data. Within the scanning queue the user has the option to select the template that will be used to match the donation form. It takes approximately 1 minute to scan 106 donation slips.

The implementation of EzeScan also allows for pre-populated reply slips sent out in mailings to be scanned once returned and matched to the donor with 100% accuracy. The packs can be applied to the funds all into The Raiser's Edge and into a batch. No data entry required.

Gift Catalogue forms can also be scanned in with all the gifts straight into a batch. Donors who gave $1000 and over have their details automatically emailed to the Executive Director for a personal follow up. The implementation of EzeScan allows for pre-populated reply slips from direct mail campaigns to be matched to the donor record with 100% accuracy and applied to a batch in The Raiser's Edge with no data entry required.

Invalid credit card details are removed from the queue in EzeScan and emailed for follow up and will then wait in the exception queue to be corrected.

Ms Brombal from Samaritan Purse Australia (SPA) said, this setup was all done with the helpful support received from EzeScan, and I can't praise them enough for their great customer service and working to such a short timeline.