

United Way of Greater Knoxville

Better Lives. Better Communities. Better Asset Management.



United Way
of Greater Knoxville

Company Facts

Overview

- ▶ Location: Knoxville, Tennessee
- ▶ Industry: Not-for-profit
- ▶ Website: uwgk.org

Success Highlights

Challenges

- ▶ Managing fundraising campaigns was difficult with paper forms
- ▶ Searching for paper files and checks was cumbersome
- ▶ Storing and retrieving files was expensive

Solution

- ▶ DocStar® Enterprise Content Management

Benefits

- ▶ Integrated document management solution with third-party accounting system
- ▶ Provided instant access to pledge, payment, and other donor information
- ▶ Installed solution without the need for IT support
- ▶ Reduced reliance on paper records



United Way of Greater Knoxville, one of 1,350 United Ways in the United States, has as its motto, “Better Lives. Better Communities.” Its mission is quite simple: “to bring together resources to improve the lives of people in our community by helping them achieve their potential for self-sufficiency.”

The non-profit, which has served its local communities since 1922, raises money from the community and allocates it to member agencies that provide health and human service programs. Work is done by a small core staff, nearly 40 board members, and a strong corps of volunteers.

Initial problems

Operating with a small staff, United Way of Greater Knoxville faces a constant challenge of finding efficiencies and being a good steward of resources entrusted to it by donors. Over the years, managing fundraising campaigns and meeting donor goals became increasingly difficult for a number of reasons.

Paper was one reason. Campaign documents, such as donation forms, donor demographic information and actual donations—checks, for instance—were sometimes fragmented between various offices, filing cabinets, and on-site and off-site storage facilities.

“At one point, we had upwards of 300 boxes of stored documents,” recalls Cheryl Hair, senior vice president-operations and CFO. “And that doesn’t include papers that were in—or supposed to be in—our filing cabinets.” It was all too common for checks to be on someone’s desk, waiting to be deposited and recorded.

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—Cheryl Hair, Senior Vice President-Operations and CFO

Workflow challenges existed as well. “We have a very small accounting staff,” Hair explains. “They do a terrific job, but they were faced with more accounts payable and accounts receivable transactions each day.”

In addition, things would sometimes disappear. “Some documents would go missing,” she recalls. “For example, somebody might need something from an accounting file and they’d pull it, but not tell us or, worse yet, not return it in a timely manner. It’s important that we have immediate access, especially when a donor calls and needs a record of their donation.”

If the record was more than a year or so old, the file was probably not even on site, but rather at a remote location. Plus, the organization was paying for that off-site storage. Something had to give. “We needed to find a way for our whole organization to be able to easily retrieve and look at documentation, whenever they needed to do so,” Hair explains.

Finding a solution

United Way of Greater Knoxville started exploring options and found electronic document management as a possible alternative to its current way of dealing with documents and files. “We talked with other United Way staff, and learned what they were doing and the benefits that scanning and electronic document storage and retrieval had within their operations,” Hair notes.

In addition to finding a solution, the organization was looking for an easy implementation. “We don’t have an IT person, so we were looking for behind-the-scenes support to get it installed, up and running,” Hair explains. She was referred to DocStar reseller Imaging Technology Consulting, led by Mike Shaw, and in August 2010 went live with the DocStar electronic document management system.

“ITC helped us get everything set up to begin with,” Hair recalls, “and they have been

extremely involved in helping us not only get our data into the system, but they also have been very creative in helping us find solutions to various efficiency problems we were trying to solve.”

The DocStar system was attractive not only because of the document storage and retrieval efficiencies it would bring. It also integrated with software the organization already used, including Financial Edge, which is a fund accounting software program for non-profits, and Andar/360 fundraising management software.

The organization started scanning pledge and payment documentation. With front-end scanning, employees capture, index, and track existing and new campaign transactions and any supporting documentation. Donations packages that once were split between physical different storage areas are now kept intact with PackageWorks and are instantly accessible.

“That impacts the whole organization,” Hair explains, “and that’s why we focused on it early on. Pledges and payments also represent the greatest volume of paper, and the information needs to be accessible by nearly everyone in the organization.” With 15,000 or so such pledges and payments each year, this initial work paid off rather quickly.

“We started scanning other documents, as well,” she adds. “We began from a certain point going forward, and have been letting things age out, and then we destroy the records as their maximum retention age is met.” They also started pulling storage boxes and scanning older documents into the system.

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About DocStar

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