



Frequently Asked Questions about DonorFirst™

General

What is DonorFirst™?

DonorFirst™ is turn-key, private labeled Software as a Service (SaaS) platform that combines business processes, workflows, content, and optional accounting services, to create a comprehensive solution for organizations that work with donors using multiple charitable instruments.

Designed to provide online access and administration for a variety of users including individuals who have Donor Advised Funds (DAF), endowments or supporting organizations, DonorFirst™ is the only solution in the market to effectively merge the social engagement promise of the internet with philanthropic and charitable instruments.

Do we need to adopt all of the DonorFirst™ functionality, or is it modular?

While DonorFirst™ contains multiple capabilities and features for information delivery and active engagement; it can be deployed in any combination of stages, based on an organization needs. Regardless of the deployment schedule, DonorFirst provides a single end-to-end solution with no additional modules to add, additional features and functions are always available when and if you're ready to use them.

Integration

What 'back-office' systems can DonorFirst™ be integrated with?

DonorFirst™ has been designed to seamlessly work with existing core systems used by foundations.

Our clients employ a broad base of commonly available systems and we have been able to integrate with them all, including systems from MicroEdge and Blackbaud.

What kind of integration do you have with Guidestar?

We are able to make maximum use of the Guidestar resources through direct web-based integration with their database. Donors are able to search for grantees and access GuideStar's premium level of content, including content such as IRS Form 990s and CharityCheck reports. Our platform technology has been designed to automatically attach due diligence documents to a grant record, and it can even use Pub 78/BMF status information from Guidestar to automate certain due diligence steps.

Where is grantee information/summary pulled from: FIMS or GuideStar?

Both, DonorFirst™ can pull information from your current system and from GuideStar. All DonorFirst™ clients receive GuideStar Premium services, which can be used for the creation of new organization records, and for both donor and staff research of potential grantees.

How is a grant request processed?

DonorFirst™ includes grant processing functionality incorporating workflow capabilities. DonorFirst™ can be used for processing all grant requests up through issuance of the grant letter

DonorFirst™ exports grant payment information to our clients' external accounting systems, and then imports the tracking results from the system (such as date paid, check ID, etc.).

Is there any double entry of data/information with DonorFirst™?

No, there is no double data entry. The grant payment information gets exported from DonorFirst™ and imported into the existing back end accounting system. DonorFirst™ integration is designed to be reliable, fault-tolerant, easy-to-use, and provides a robust audit trail.

Can data import/export be automated?

Yes, full automation is possible with some systems, although our clients have found they prefer to manage the file transfer approach without this feature because it provides better controls. Where full automation is not possible, the manual file transfer approach is a process that takes less than 5 minutes – and allows for control.

Is data import/export bi-directional?

Yes.

Does DonorFirst™ track the spendable/grantable balance?

The Grantable Balance is a key component of the business logic within DonorFirst™. It is used within the workflow to track the eligibility of a grant to be processed, based on underlying rules including fund balance, minimum account balance, in-process grants, grant restrictions and, in the case of endowments, annual spendable balances. Fund balance is exported from the foundation's core system using the fund statement export and is updated daily (or at any requested frequency) in DonorFirst™.

How is the grant or contribution data pulled into DonorFirst™?

Once implemented, DonorFirst™ becomes the system through which all grants are originated. This provides a fully integrated solution and a single interface for all related activities.

Process and workflow:

Who processes the online gifts in the Giving Opportunities page?

Grants to both internal programs and external grantees are processed in the same way; by staff users assigned the grant processing roles. Because DonorFirst™ uses a step-based workflow, individual steps in the grant

processing sequence can be assigned to different staff users based on their organizational responsibilities, such as due-diligence versus financial responsibilities.

We already have online giving through our web site and wonder if the DonorFirst™ giving options would be separate, or if they would flow through to what we already have set up?

DonorFirst™ is currently and exclusively focused on the processing of giving activity originating out of established charitable accounts such as DAF or field of interest type funds, rather than simple cash gifts. We are open to adding the latter functionality to DonorFirst™ as well as integrating with online cash giving solutions of other vendors.

How many community foundations are currently using DonorFirst™?

Our client list includes major Jewish Federations, higher education institutions, multiple faith-based charities, and national charities.

We have one major community foundation client and others engaged in different stages of set-up. All of our clients are happy to serve as our references.

How well established is DonorFirst™?

Active day-to-day clients use of DonorFirst™ began in 2009.

Can donors invite other donors to contribute?

Yes. DonorFirst™ has sophisticated invitation functionality that can be used by both staff and donors to drive Social Philanthropy.

Integration with websites and Content Management Systems

How easy is it to set up and edit web pages, add/change information, add new pages, etc.?

Very easy, the content delivery portion of DonorFirst is a CMS.

Do you need HTML experience?

No.

How does it integrate with an existing CMS used for the public website?

They work in tandem to deliver your public and private content. DonorFirst fully supports RSS integration.

Learn More

How can we see more examples of online donor collaboration and engagement?

We are happy to setup a one-on-one demo where we can explore whatever areas of DonorFirst interest you. Contact us at 877.DONOR85 ext. 345 or info@crownpns.com.