

iDonate Failed Credit Cards

Names		Date Documented	Location
Marketing & Development team		03-04-24 to 01-06-24	
The problem: 1	The cause: 2	The change: 3	
<ul style="list-style-type: none">• No standard process for managing failed recurring donations on the new iDonate platform• Donors were not being consistently contacted, and donation recovery was inefficient• Staff lacked a single source of truth, leading to inconsistent handling	<ul style="list-style-type: none">•Transition to iDonate happened without a documented process for handling failed recurring transactions•Teams relied on outdated or duplicate reports (iDonate + CardPointe), creating confusion•Donor contact info was often incorrect or not synced across systems• No unified communication or follow-up system, leading to inconsistent donor recovery efforts	<ul style="list-style-type: none">• Created a Standard Operating Procedure (SOP) in OneNote for failed credit card cases• Centralized documentation to guide Donor Services and Gift Processing• Prepared for upcoming Salesforce integration by aligning with iDonate workflows	
The impact: 4			
<ul style="list-style-type: none">• The new SOP provides a centralized, accessible guide for staff handling failed recurring donations• Donor Services now responds more consistently and efficiently, reducing missed opportunities to recover donations• All team members (Donor Services, Gift Processing) are aligned in how they handle issues, improving internal coordination• Donors are more likely to stay engaged and maintain giving, thanks to timely outreach via email, phone, or mail• Staff spend less time troubleshooting, and more time on strategic donor care• Prepares the organization for a smoother transition to Salesforce, ensuring this workflow carries forward• Helps protect an annual recurring gift base of over \$86,000 from lapses due to preventable credit card issues			