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where to start? 5 high-impact automation wins

the intersection of lives, leaders and neighborhoods



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executive overview

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mission + vision //

- ▶ to love our neighbor by revitalizing under-resourced neighborhoods through spiritual and community development
- ▶ partnering with leaders to develop thriving and sustainable organizations



desire street history – first 30 years //

- ▶ **1990** – founded by mo + ellen leverett in new orleans' ninth ward desire community
- ▶ **1997** – danny wuerffel began volunteering at desire street
- ▶ **2004** – danny retired from the nfl and began working full time at desire street
- ▶ **2005** – hurricane katrina destroyed facilities
- ▶ **2006** – danny became executive director
- ▶ **2008** – head office moved to atlanta
- ▶ **2010** – mission focus expanded:
 - ▶ to partner and develop leaders living and serving in under-resourced neighborhoods across the southeast
- ▶ **2020** – 20+ ministries impacted over first 30 years



5-year strategy //

- ▶ develop 20 thriving and sustainable partners by 2025
 - ▶ 10 current partners
 - ▶ graduate ~2-3 partners per year
 - ▶ add ~2-3 partners per year
 - ▶ total of 20 by 2025 – completed 27





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47% of urban youth workers surveyed indicated that they needed more coaching / mentoring to "last" in ministry

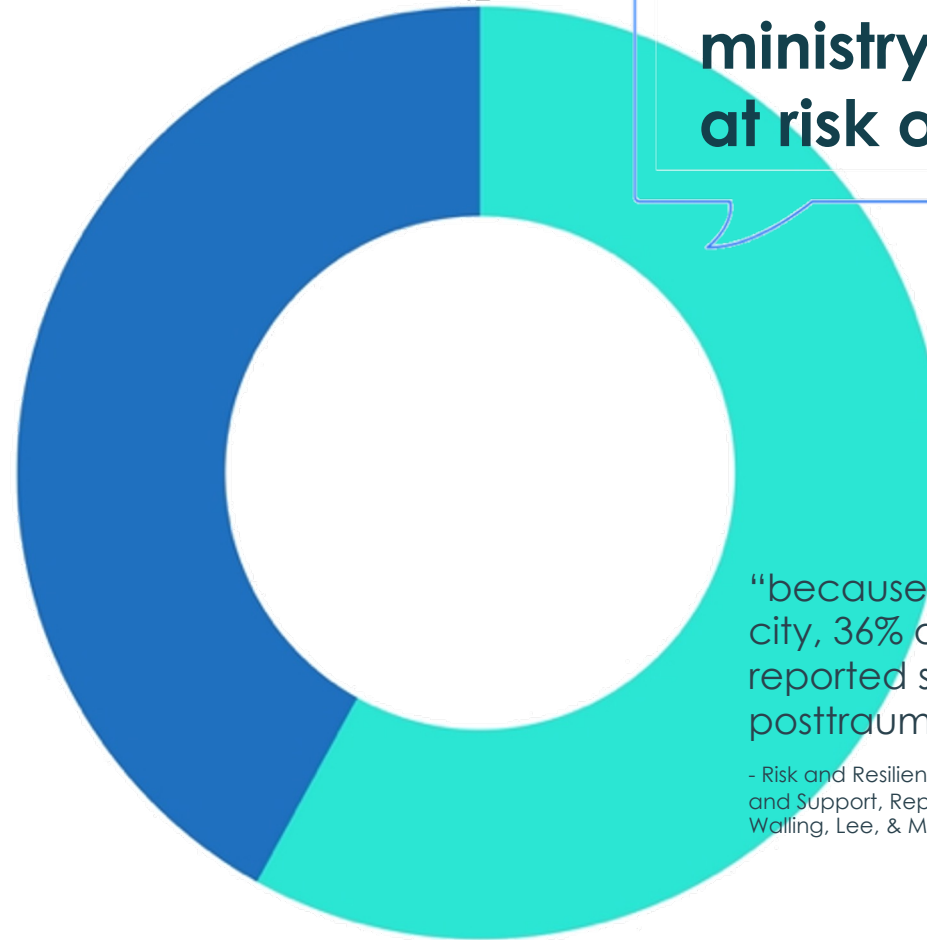


37% indicated that they needed more training in how to relate effectively to the youth they are serving



43% indicated they needed help learning to better balance ministry and other life commitments

"most everybody we interviewed agreed that the inner city can be a war zone."
– fuller youth institute



"58% of urban ministry leaders are at risk of burnout"

"because of the stress in the city, 36% of urban youth workers reported significant levels of posttraumatic stress."

- Risk and Resilience in Urban Ministry: Stress, Spirituality, and Support, Report of General Findings (Eriksson, Shin, Walling, Lee, & Montgomery, 2007)



// what does desire street do? //

- ▶ we encourage + equip + connect neighborhood ministry leaders
- ▶ to help develop thriving + sustainable ministries

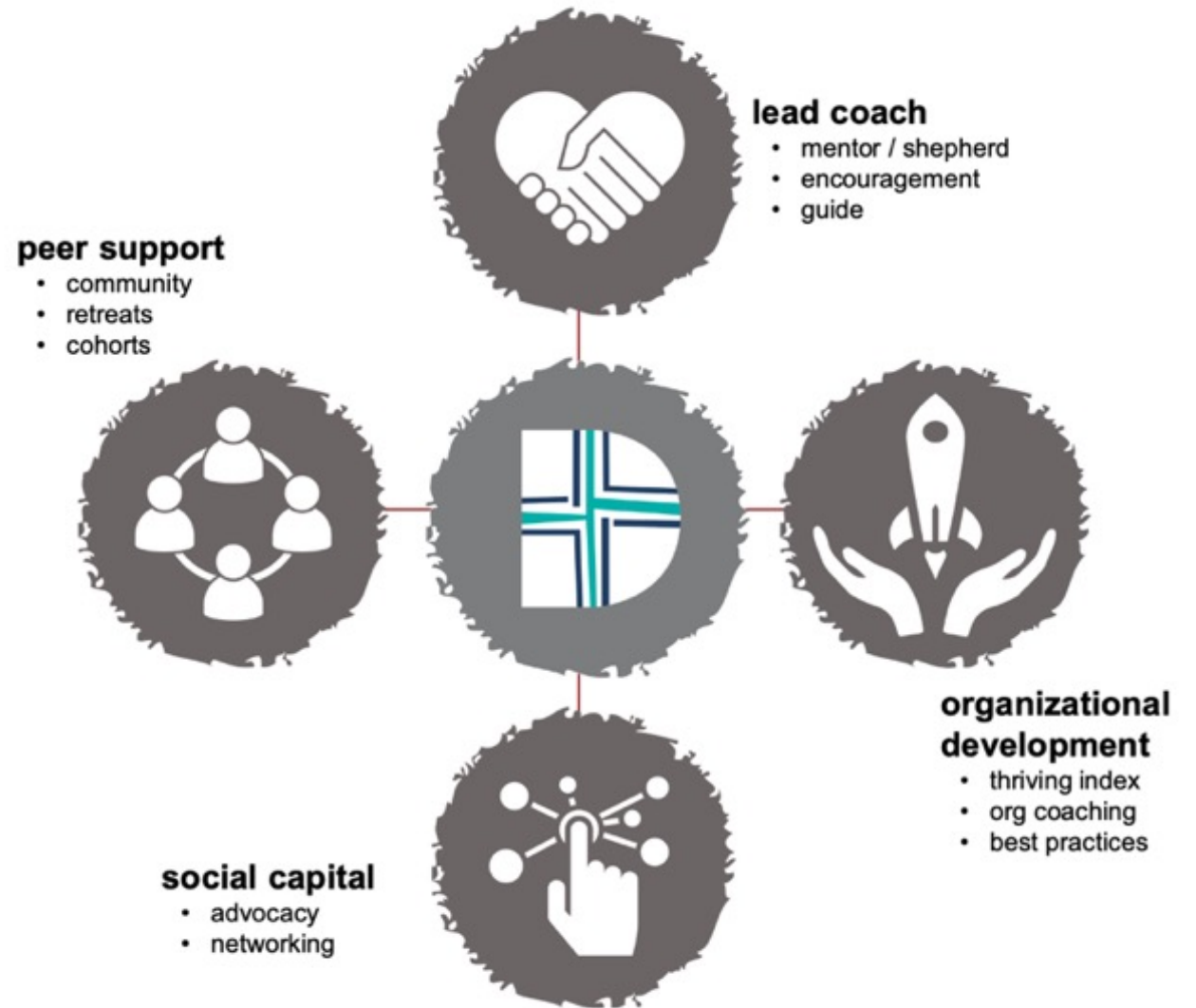




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partner service offerings

- ▶ focus on leader health and long-term sustainability
- ▶ coach and care
- ▶ organizational development
- ▶ social capital advocacy
- ▶ peer support, retreats, etc.

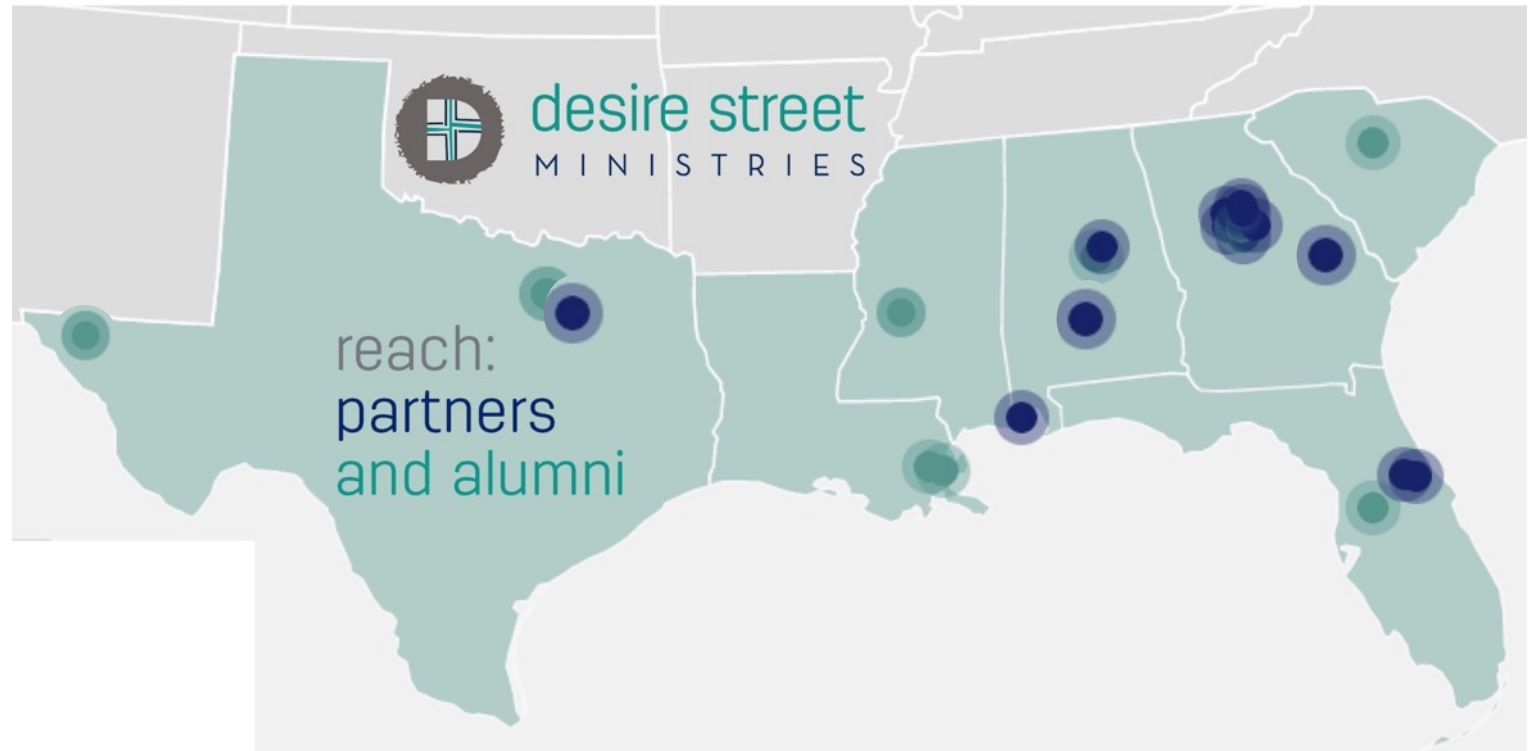




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partner ministries

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our cloud & automation journey



2016

- Server-based technology stack
- Technology assessment and recommended actions



2017

- Began strategic technology plan
- Goal: Migrate to cloud-based platforms
- Theme: Workflow automation



2018

- Cloud file storage
- Cloud email
- Cloud CRM
- Cloud expense management



2019

- Cloud financial system
- Retired server platform
- Began workflow automation



2020

- Digital mail scanning
- Automated check deposit
- Online bill pay
- Ported phone to MS Teams



2022+

- Program workflow automation
- HR function automation
- End-to-end administrative automation



tech
transformation
journey



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workflow automations, tools, & platforms

- ▶ file sharing – dropbox & onedrive
- ▶ mail digitization – virtual post mail
- ▶ check deposits – virtual post mail
- ▶ online giving – fundraise up & bloomerang
- ▶ bill processing – ramp & quickbooks online
- ▶ office productivity – ms office
- ▶ expense management & payroll – qbo
- ▶ crm / donor management – bloomerang
- ▶ online banking – mobile deposits & bill pay
- ▶ program automation – ms stack: forms, power automate, teams, outlook

// how hard can it be? //

“Seventy percent of transformations fail. Contributing factors include *insufficiently high aspirations*, a *lack of engagement within the organization*, and *insufficient investment* in building capabilities across the organization *to sustain the change*, among others.”

Harry Robinson, Sr. Partner – McKinsey & Co.



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let's
automate

1. consider cloud platforms
2. understand your operational workflows
3. keep in mind end goal of automation
4. integrations accelerate automation
5. leverage tools from microsoft / tech soup / others
6. artificial intelligence?

// automation 1 //

- ▶ **online giving** (2018) – from manual data entry to automation
- ▶ reduced manual effort **from 3 hours to 10 minutes** to process 20 transactions



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before:

online donation
manual
processing

1. donor gives online
 2. pull report from online donation system
 3. log into donor mgt system to determine if existing donor
 4. enter each donation into donor mgt system
 5. batch donations to match bank deposit
 6. print and mail receipt for each donation
- 20 donations took 3 hours to process



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after:

automated
online
donations

1. donor gives online
 2. donation automatically flows into donor mgt system
 - ▶ automatically updates donor timeline with gift and all relevant details
 - ▶ or, automatically creates a new donor record if first-time donor
 3. donor automatically receives real-time customized email receipt
 4. donations are auto-batched and deposited to bank
 5. online financial system automatically updated
-
- ▶ 20 donations now only take 10 minutes (verifications/exceptions)

// automation 2 //

- ▶ **payroll** (2019) – from manual semi-monthly process to automated recurring direct deposits
- ▶ reduced manual effort **from 1 hour to 2 minutes** to process payroll twice per month
- ▶ other examples in the room?

// automation 3 //

- ▶ **digital mail processing** (2020) – from manual handling of daily mail and check deposits to automated digital process
- ▶ reduced manual effort **from 10 hours to 1 hour** monthly to process mail

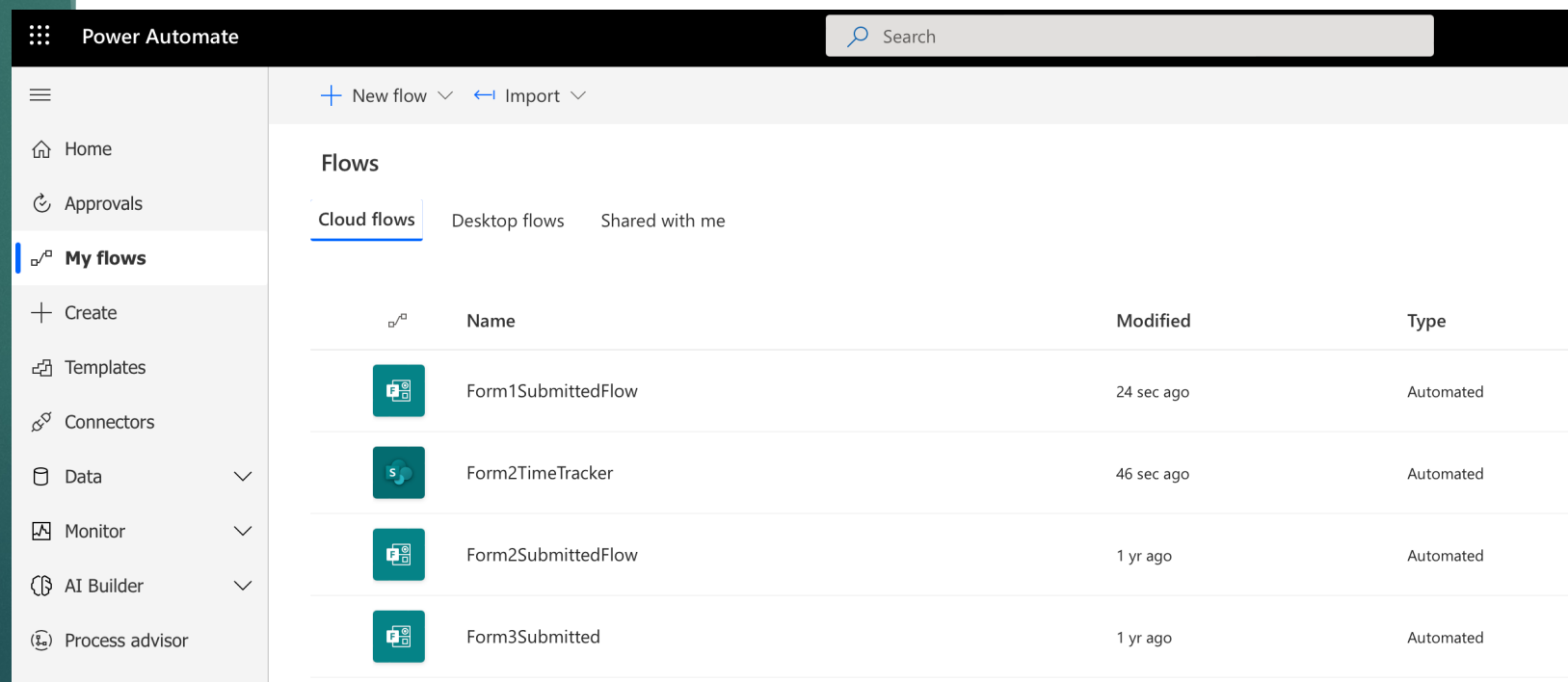
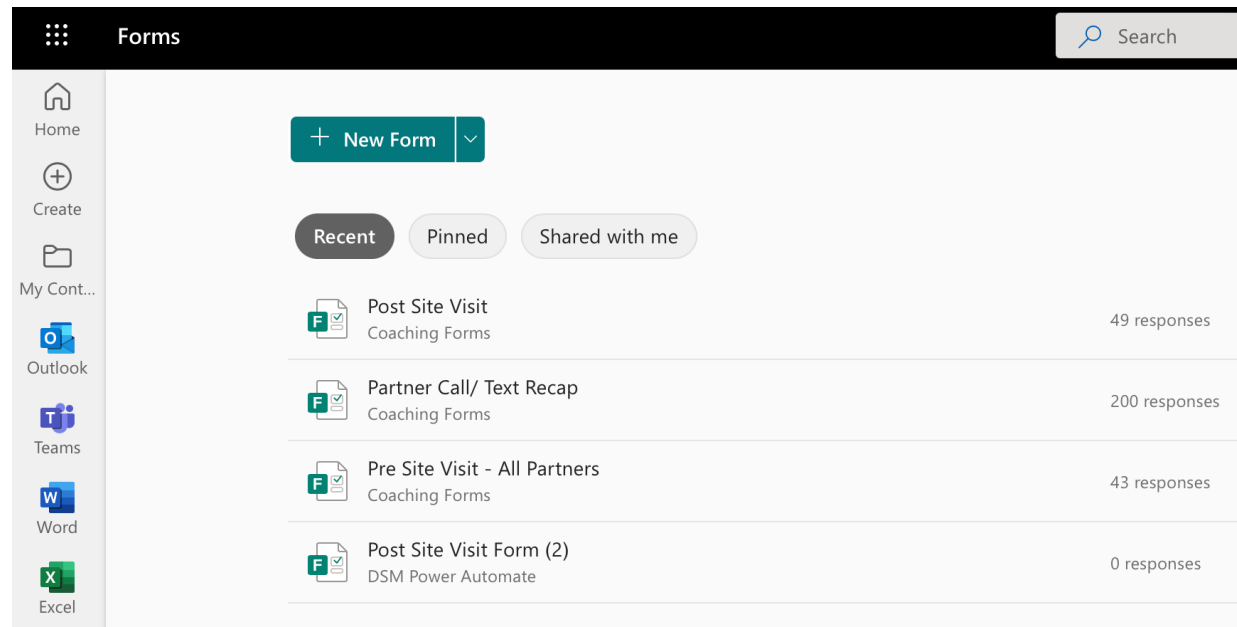
// automation 4 //

- ▶ **programming workflows** (2024) –
- ▶ reduced manual effort **from 20 hours to 1 hour** quarterly to gather and track coaching metrics



program
automation

microsoft stack:
forms, power
automate,
teams





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program
automation

microsoft stack:
forms, power
automate,
teams



TestCoachChannel

Posts

Files

Wiki

Form 1

Fill | Partner Call/ Te...

1 more



Partner Call/ Text Recap

Hi, James. When you submit this form, the owner will see your name and email address.

* Required

1. What Partner did you call or text? *

- ☐ Justin Bleeker | Grove Park Renewal
- ☐ Drew Henley | Redeemer Community Church
- ☐ Charles Lee | That's My Child
- ☐ Carlton Oby | Mercy Street
- ☐ Stephen Pittman | Hope for Augusta
- ☐ Christy Smucker | The Mom Community
- ☐ Becca Stanley | Blueprint 58
- ☐ Eric Stites | CrossTown Ministries
- ☐ Danny White | Trinity Family
- ☐ Benjamin Wills | Peace Preparatory Academy

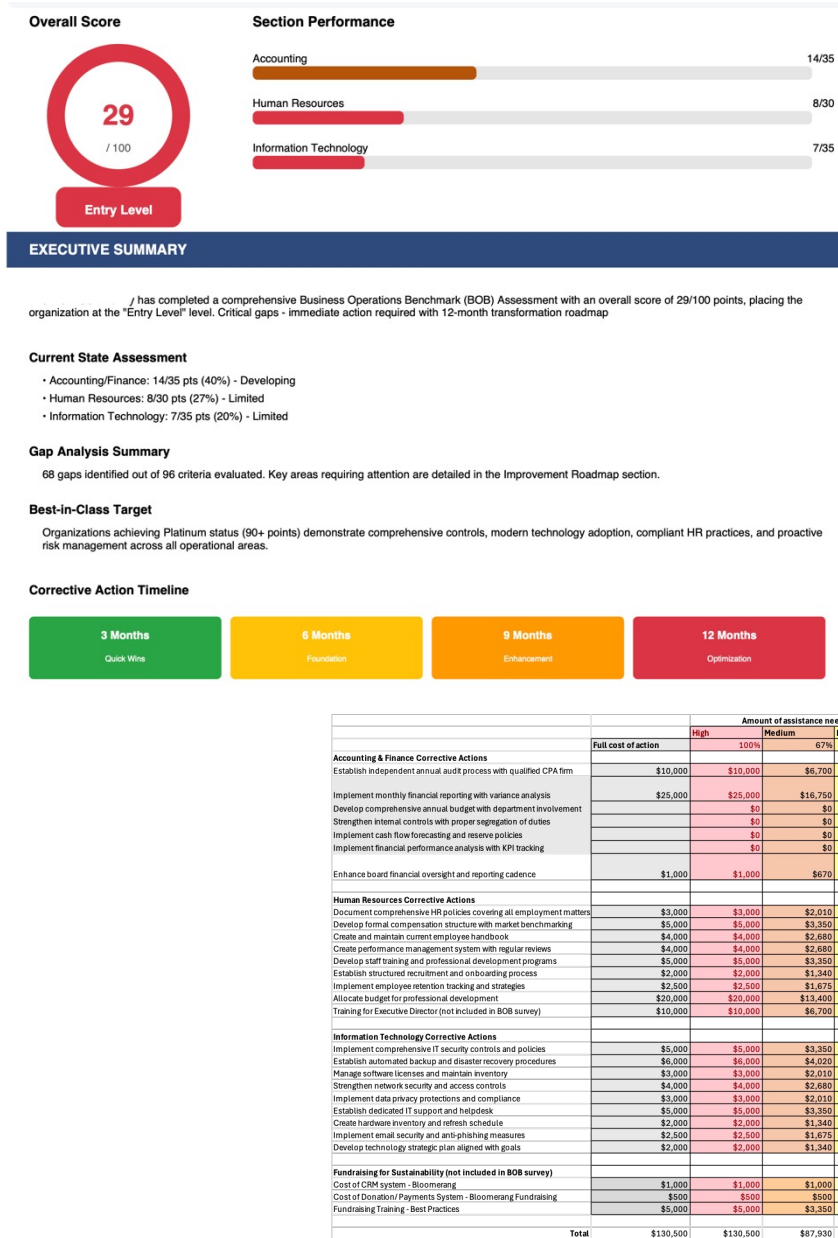
// automation 5 //

- ▶ **back-office assessment** (2026) – establishing a new service offering for our partners
- ▶ leveraging ai tools, we created an assessment for accounting, technology and hr functions that includes automated recommendations and built-in cost model



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back-office blueprint



// how do we get there? //



First-time donor “Thank You” email

Imagine you make your first gift to a nonprofit and they send you a warm, welcoming email telling you how thrilled they are to welcome you into their donor family. That would feel a lot better than a generic thanks. The solution for acknowledging new donors is as simple as adding one sentence at the beginning of your thank you letter acknowledging that they're a new donor, welcoming them to your donor family, and signaling to them that there are great things to come,

- ▶ be thoughtful and intentional – plan strategically, leverage tools
- ▶ get early buy-in of why automation is needed
- ▶ develop a plan that includes broad stakeholder representation
- ▶ get expert help – many nonprofits do not have internal capabilities
- ▶ embed change management throughout entire journey
- ▶ start simple with small wins and build from there

// discussion //

- ▶ what are your challenges to automation?
- ▶ what specific change management issues have you encountered?
- ▶ what help could you use?

- ▶ discussion activity:
 - ▶ break into groups of 2-3 and discuss
 - ▶ share one key learning from group discussion



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considerations for your automation journey

- ▶ do thoughtful, strategic planning to modernize your technology platforms
- ▶ start simple – automate a basic task
- ▶ don't be afraid to ask for help
- ▶ understand your operational workflows
- ▶ consider integrations wherever possible
- ▶ leverage nonprofit tools and help
 - ▶ microsoft
 - ▶ google
 - ▶ zapier – automation/integration
 - ▶ tech soup
 - ▶ tech impact
 - ▶ ai leaders
- ▶ don't forget change management!



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questions?

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@jamesgadsby

thank you!

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