Supporting the minds of tomorrow.
Iowa State University Foundation organizes life-changing funding for future innovators using Adobe Sign and Microsoft solutions.

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Dave Thalacker, Ph.D., Senior Director of IT Operations and Network Security, Iowa State University Foundation

SOLUTION
Adobe Document Cloud
Microsoft SharePoint, Microsoft Teams, Microsoft Flow

RESULTS

- Puts funds in the hands of recipients faster by SHORTENING approvals by 13 DAYS
- Leverages MICROSOFT INTEGRATION to reduce errors and manual administrative tasks
- Reduction in printing leading to LOWER COSTS and less paper waste
- 30% PAINLESS DEPLOYMENT with flexible workflows running through familiar tools
Funding innovators of the future

One of the biggest goals for all universities is to create an environment that promotes learning and success for students. Schools accomplish this by providing cutting-edge facilities, innovative research opportunities, and top faculty advisors. Generous donations are one of the keys to reaching these goals while still keeping the doors open for any student eager to learn, no matter what their financial background.

The Iowa State University (ISU) Foundation is an organization dedicated to raising funds that support students, faculty, buildings, and programs at Iowa State University. Gifts made to ISU through the foundation have made a significant impact on the university experience, from fellowships and professorships that help attract and retain faculty who are making impacts in their fields to scholarships that help students focus on their studies.

"The Iowa State University Foundation is much more than just a fundraising organization for ISU," says Dave Thalacker, Ph.D., Senior Director of IT Operations and Network Security. "We also work with donors and the university to make sure that donors’ generous gifts are used in a way that is meaningful to them. A family might want to honor the life of an ISU graduate and animal lover with a donation to the College of Veterinary Medicine. We work with the College to make sure that the gift can be used to make an immediate impact on students, teachers, and the community."

The key to developing meaningful and useful gifts is clear communication. This includes communication with donors, ISU, and any other stakeholders, but also with parties involved in maintaining compliance for these monetary donations. As a result, each donation involves a large amount of unique paperwork and signed approval from numerous stakeholders.

As part of a larger automation and digital transformation initiative, the foundation decided that implementing an electronic signature solution could help modernize and streamline this donor compliance workflow. Adobe Sign, the electronic signature solution within Adobe Document Cloud, quickly fit into the workflows and improved turnaround times and compliance while reducing waste.

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Getting donations to recipients 13 days faster

Most sizable donations start with personal visits with a foundation development officer. The development officer collaborates with donors about what is meaningful to them and what type of gift they might want to make. The donor compliance department then takes over, drafting those wishes into a donor gift agreement. Depending on the type and scope of the donor’s wishes, the agreement might pass through the offices of college deans, program heads, and professors before receiving approval from the foundation’s senior management team. Finally, the agreement is sent to the donor for signoff.
Before Adobe Sign, agreements were printed on paper and systematically mailed to each stakeholder. Agreements might get delayed as they were routed through internal university mail systems, or they might sit on a desk during a busy time. As a result, getting approval from all parties could take weeks, with the average turnaround time of 81 days.

“Every day a gift got delayed was a day that a student didn’t get needed services or a lab went without critical equipment,” says Thalacker. “In extremes, if the donor agreement was delayed too long, a donor might lose interest about giving to ISU. This was particularly important in cases where a donor wants to make an immediate impact or transformational gift. We needed to streamline the agreement workflow and better capitalize on these opportunities to encourage donations.”

Both internal teams and donors themselves started asking for a better way to process these agreements. With Adobe Sign, the donor compliance team now sends electronic copies of agreements directly to a stakeholder’s email inbox. Signers can view and sign agreements in minutes, without needing to download additional apps or set up a special account. The digital agreements can even be sent to multiple signers simultaneously, reducing the impact on turnaround times if one signer is delayed in signing the agreement. Switching to electronic documents also helped the team reduce costs and waste associated with printing. Since implementing Adobe Sign, the team decreased printing by 30%.

“With Adobe Sign, we’re saving more than 13 days on the average turnaround time,” says Thalacker. “Rather than spending their time tracking and following up on agreements, teams can focus their time on working with more donors and completing more agreements.”

Dave Thalacker, Ph.D., Senior Director of IT Operations and Network Security, Iowa State University Foundation

Smooth integrations with Microsoft applications lowers the learning curve

Part of the reason that Adobe Sign is having such a big impact at the foundation is its critical integration with Microsoft solutions, including Microsoft SharePoint, Microsoft Teams, and Microsoft Flow. When looking at electronic signature solutions, compatibility with these business-critical Microsoft solutions was key.

“Adobe Sign was the only solution we found that had a strong vision of integration into existing Microsoft workflows,” says Thalacker. “We’re using familiar tools to do more and work faster. We had positive relationships with both Adobe and Microsoft, so, we knew their partnership was something that we could rely on.”

Microsoft SharePoint is heavily used throughout the organization to organize and share donor information. Before Adobe Sign, administrators would spend hours carefully typing all of the gift details into files in SharePoint and updating workflow status at each stage to track the status of the agreement.
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By integrating with Adobe Sign, agreements are now automatically uploaded into SharePoint. Adobe Sign automatically tracks the status of each agreement, and staff can quickly check this status directly in the SharePoint record. Not only does the automation eliminate much of the administration time, but it reduces any errors from manual input.

Using planned Microsoft Flow automations, agreements will be automatically pulled into document libraries that can be accessed using Microsoft Teams. This allows staff to quickly check on an agreement in the context of the relevant Team site and channel. A development officer can quickly update a donor on the status of an agreement without needing to email the donor compliance team for constant updates. Managers can check the status of all active agreements for their entire team from a single tab. Microsoft Flow also allows staff to set up automated alerts at different points during the workflow, such as if they want to be notified after the agreement is signed by the senior management team.

Through the partnership between Adobe and Microsoft, deploying and integrating Adobe Sign was also very painless. While the foundation initially tried a slow and cautious approach to deployment, it discovered that Adobe Sign was also well-suited to fast deployment without the need for long ramp-up discussions and training. Teams can work with Adobe Sign through familiar Microsoft tools, which dramatically lowers the learning curve. Adobe Sign is also highly flexible, enabling Thalacker and his team to make changes and adjust workflows quickly to best suit teams’ needs based on actual team feedback.

Communicating between teams with PDF

In addition to working with Adobe Sign, the foundation uses another Adobe Document Cloud solution, Adobe Acrobat Pro DC, across many teams and processes. The communications team uses Adobe Acrobat in conjunction with the work management platform Workfront to automate workflows for proofing and approvals. The team first uses Adobe Creative Cloud apps such as Adobe InDesign CC and Adobe Illustrator CC to create content, including reports, graphics, and print and web advertisements. The team then outputs content in PDF to Workfront, where it is automatically routed to stakeholders for review and approval.

“We like using Adobe Acrobat and PDF for reviews because it provides us with a universal format that anyone can easily access,” says Ryan Peterson, Senior Director of Creative Services for the Iowa State University Foundation. “Using the commenting tools, people can add their comments directly on the PDF, making it much easier for creators to collect and respond to feedback.”

Other teams use Adobe Acrobat for its ability to annotate and redact information on records. When the accounting department receives remittance data or donor forms in secure PDF format, it uses Adobe Acrobat to redact personal information. The accounting team then adds information to the PDF that helps the records team accurately ingest the data into the internal imaging system and customer-relationship management system.
Filling a demand for technology

While the Iowa State University Foundation first started using Adobe Sign in donor compliance workflows, the use of Adobe Sign quickly spread to other processes, including the proposal routing form, with pledge forms coming soon as well. The proposal routing forms can involve more than five signers, but in tests, Adobe Sign has been very successful even in these complex workflows.

"We couldn’t have predicted that Adobe Sign was going to be so successful in our organization," says Thalacker. "There’s a pent-up demand for technology, and once people find out about it, they’re knocking on our doors asking to start using Adobe Sign to streamline their processes. By integrating Adobe Sign into existing Microsoft workflows, we’re making peoples’ jobs much easier so that we can process donations quickly and start making an impact for the people at Iowa State University much faster."

SOLUTION AT A GLANCE
Adobe Document Cloud
Adobe Sign
Adobe Acrobat Pro DC
Adobe Creative Cloud for teams, including:
  Apps: Adobe Illustrator CC, Adobe InDesign CC
Microsoft SharePoint
Microsoft Teams
Microsoft Flow

For more information
www.adobe.com/creativecloud/business/teams.html