



## Case Study: Banking

# Teach For America Plans a Donation Process Transformation

Cognizant created a plan to streamline how Teach For America (TFA) processes incoming donations. The new plan will help automate and simplify internal processes while increasing data quality over time.

TFA, a US-based non-profit, believes all children have the right to an excellent education. Its mission is to confront educational inequities in underserved areas. To pursue its mission, the organization recruits promising leaders to teach for at least two years in public K-12 schools across 50-plus regions, who provide students with an excellent education while developing a lifelong commitment to educational equity. In support of its mission and goals, TFA builds strong donor relationships that provide the needed financial support that underpins the program.

TFA has developed a network of over 64,000 current teachers and program alumni since it was founded in 1990, and together, they serve in more than 9,000 schools nationwide as teachers and school leaders.

## At a glance

Cognizant created a plan for Teach For America, a US-based educational non-profit, to transform donor payments processing. The proposed system will offer a range of benefits, including:

- The ability to handle multiple payment types with extensibility for new types over digital channels
- Better reporting to enable staff to explore additional opportunities for giving with donors.
- Increased flexibility by using automation to free resources for other needs

## The Challenge

Having scaled rapidly as an organization, TFA's internal infrastructure to process incoming donations had been built gradually and scappily over a period of many years with no end-to-end process owner to make holistic improvements. Now in a period of business process transformation, TFA reached out to Cognizant to design a donor payment solution to simplify and streamline the current donor payment process.

The proposed plan Cognizant developed will position TFA to accept future payment types readily, streamline how they match payments to donor profiles, and, most importantly, free up resources to focus on other mission-critical activities.

### Multiple systems, payments and teams

The current TFA gift payment and processing landscape consists of several internal and market-leading external systems that handle different payment types such as wires, checks and credit cards. Individually, the standalone systems are fit for task, but they are not fully integrated with one another nor fully automated.

Through largely manual processes, the payment and donor data are uploaded to TFA's Salesforce CRM instance. Final reconciliation takes place in the TFA accounting system.

The many manual processes contribute to lengthy learning curves for gift processors and revenue accounting alike, which increases the potential for human error and, at times, requires additional data cleanup.

### Evolving payment and donor ecosystem

Because TFA offers a range of options through which interested donors can make gifts (e.g., wire, check, credit card, stock), the new system must be flexible enough to accommodate these and other future payment forms. It must handle the highest-volume donation type, credit card, and facilitate the careful management of the highest-value donations received via wires and checks. TFA wants to closely nurture, on a personalized basis, the long-lasting relationships these high-value donations represent while offering a modern portal for the increasing number of donors who are more inclined to interact with TFA virtually.

## The Approach

Cognizant began by mapping out TFA's payment technology and business processes. Then we worked with TFA executive sponsors and strategists to set guiding principles and identify opportunities to improve donor experiences, increase processing speed and accuracy, reduce system complexity and optimize business processes.

### A gift processing platform

The new proposed processing solution architecture rests on four critical pillars:

- A gift portal accessible from the TFA website to enable donors to give through a variety of payment options
- A strategic donation gateway to more efficiently route payments and expedite funds availability
- Stronger integration to increase automation and reduce manual efforts
- Improved reporting and analytics with access to dashboards and insights for both TFA and donors

The gift portal will present a user-friendly face to both centralized and remote donors, as well as employees and volunteers, making it easier for each group to interact with TFA. Donors will be able to register and view payment histories, while employees can perform functions such as viewing donor profiles and donation trends and matching donor profiles to their incoming payments. The portal will reduce processing time and the number of manual processes while providing comprehensive data analytics and real-time snapshots of payment status.

The powerhouse of the new gift-processing platform is a strategic donation gateway. It acts as a unified and simplified integration source for all payments by seamlessly and securely interfacing with external payment service providers, the gift portal, TFA's Salesforce CRM and a modernized payment data store. Security and accountability are also both enhanced, and the scalable gateway will accommodate current and planned payment types and provide extensibility to future payment modes such as digital currency.

“Cognizant really delivered. They brought the expertise and capacity we needed to help us better understand existing trends in finance digital processes, as well as promising practices that are still at the cutting edge. Even better, Cognizant excelled at the how. They worked tirelessly and collegially with us as a team and took the time to really understand our unique context and complex constraints. We came away from the engagement with well-considered options, a bigger toolkit, and a richer understanding of what we can accomplish.”

– **Josh Griggs Executive VP, Talent, Operations & CFO**  
**Teach For America**

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## A Roadmap to the Future

The donor process transformation recommendations will enable TFA to objectively evaluate the capabilities of potential payment processing vendors and create a two-pronged roadmap for transitioning from its current state to the new gift processing platform

The need for non-profits to carefully manage costs and resources is of vital importance. For this reason, Cognizant mapped out two implementation routes—both utilizing, as much as possible, commercial-off-the-shelf (COTS) products. One route speeds TFA to the new gift processing platform in a matter of months. A second, phased approach delivers quick wins, followed by incremental builds of additional capabilities over time as TFA continues to assess and balance its priorities and resources.

Whichever route TFA takes, it will be able to increase clarity around its gift processing design and gain a robust understanding of possible end solutions. There is also a toolbox to help move the donation processing redesign forward with both internal and external stakeholders.

## Investing in common goals

For years, Cognizant has supported initiatives that provide students with access to opportunities to develop STEM and digital skills, which aligns with TFA's mission. This alignment is further evidenced through the [Cognizant U.S. Foundation's recent \\$3 million grant made to TFA to expand K-12 computer science education in schools across the US](#). In addition to the Foundation's philanthropic investment, Cognizant was excited to separately support TFA with a fast-moving strategic engagement to transform the organization's payment system on a pro bono basis.

More importantly for TFA, increased automation will reduce manual work, improve productivity and create flexibility for the non-profit to redirect its human and budgetary resources to other mission-focused project and program activities.

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## About Cognizant

Cognizant (Nasdaq-100: CTSI) is one of the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique industry-based, consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant is ranked 194 on the Fortune 500 and is consistently listed among the most admired companies in the world. Learn how Cognizant helps clients lead with digital at [www.cognizant.com](http://www.cognizant.com) or follow us [@Cognizant](https://twitter.com/Cognizant).



### World Headquarters

300 Frank W. Burr Blvd.  
Suite 36, 6th Floor  
Teaneck, NJ 07666 USA  
Phone: +1 201 801 0233  
Fax: +1 201 801 0243  
Toll Free: +1 888 937 3277

### European Headquarters

1 Kingdom Street  
Paddington Central  
London W2 6BD England  
Phone: +44 (0) 20 7297 7600  
Fax: +44 (0) 20 7121 0102

### India Operations Headquarters

#5/535 Old Mahabalipuram Road  
Okkiyam Pettai, Thoraipakkam  
Chennai, 600 096 India  
Phone: +91 (0) 44 4209 6000  
Fax: +91 (0) 44 4209 6060

### APAC Headquarters

1 Changi Business Park Crescent  
Plaza 8@CBP # 07-04/05/06  
Tower A, Singapore 486025  
Phone: + 65 6812 4051  
Fax: + 65 6324 4051