Project Description
Identify gift receiving process for Gifts & Records Services; who receive and process all gifts from donors to the university. The team will need to create a flowchart and determine ways to trim excess time, steps and resources from the gift receiving process to make the process more efficient and effective.

Project Mission Statement
Increase efficiency in production of batches and processing donor gifts to the university in order to save time and money for the department.

Specific Client Needs
- A streamlined donation process that optimizes time and resources, while eliminating waste.
- The process mapped out in a professional process flowchart.

PMBOK Project Processes
- Initiating - Identifying team roles and responsibilities, mission statement defined, project charter signed
- Planning - Identifying risks, updating status report and project budget
- Executing - Developing prototypes
- Monitoring and Controlling - Identifying and updating any project issues
- Closing - Final Project on time and delivered to client.

Project Budget
- Estimated Project Hours: 160 hours, $160 budget
- Actual Project Hours: 80 hours, $80 spent

Technologies Used
- Microsoft Excel Spreadsheet and Macro
- Microsoft Visio Flowchart Designer
- Millenium - database program that the Gifts Process department uses to keep track of their donors.

Product Deliverables
Each flowchart prototype was designed in Microsoft Visio. The first prototype was a workflow flowchart. While this prototype helped our team map out the process, the client requested a more detailed format. Our second prototype was a process flowchart, which required a few minor revisions before turning it into the third and final version.

Project Success Factors
Two major success factors:
- The first factor of success was a detailed process flowchart which mapped out the general gifts process.
- The second factor in determining success of this project was to provide the client with an actionable method of increasing the efficiency of the process as a whole.

Lessons Learned
- Client needs are not always clearly defined, and creative questions must be prepared to achieve clear communication.
- To evaluate a multi-person process, it is necessary to meet with, and observe all involved personnel, in order to understand different perspectives.
- How to evaluate a process in order to determine effective requirements.

Project Results & Future Recommendations
Our project met the needs of the client by producing a detailed process flowchart, which maps out the general gifts process, and by creating an Excel macro for a more efficient process. In the future, this process can be further improved by automating several other reports and logs.

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