

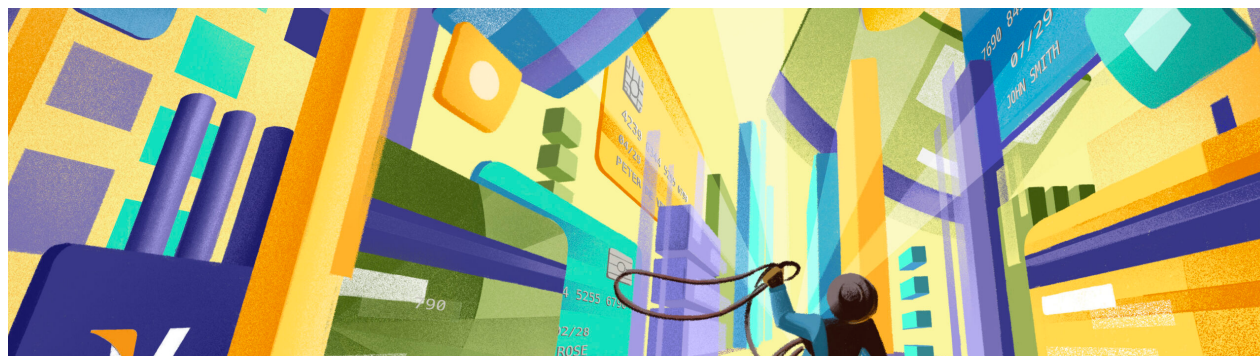
EXECUTIVE LEADERSHIP

Taming Tech Chaos in the Back Office

Giving in the digital age has been a blessing for donors — and a curse for gift-management officers.



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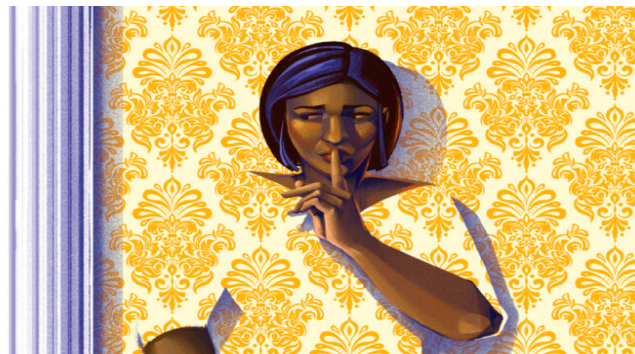
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Gift-management officers — you have our sympathy. The digital age has spawned countless easy ways to donate, but so much “frictionless” giving for donors creates headaches for you.

Checks still hit your mailbox, but contributions also arrive via a swarm of payment processors — PayPal, Apple Pay, Stripe, and the like, each with its own fees and rules. You manage three or more online giving platforms — for your gala, your giving day, your website donations. Then there’s the Facebook birthday fundraiser. And the corporation that wires a lump sum as its matching gifts for hundreds of employees, none of whom is named.

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If your donors enjoy wealth of any sort, you’re also likely getting contributions from one of the more than 1,000 sponsors of donor-advised funds, each with a bespoke system for payments and donor information. And now, one of your big donors wants to give you his Bitcoin stash. Oh, and has anyone checked the stock-brokerage account?

“It is chaos,” says Trish Davis, vice president of major gifts and planned giving at Susan G. Komen.

The challenge is particularly tough for small organizations. When Daniela Meltzer became executive director of Candlelighters for Children With Cancer in Oregon, she contacted each of the group’s payment processors as well as DAF and giving platforms to establish herself as the account owner. It became a paper chase for the Oregon group that’s still not over more than a year later.

“In many cases, I had to submit a corporate resolution from the board saying that I was authorized to do it,” Meltzer says. “They make you jump through all these hoops.”

Data Disorder

Such chaos ripples throughout the development office. Staff members who could be doing analysis to support major-gift officers and stewardship instead waste hours devising ad hoc, piecemeal data-management solutions, like writing spreadsheet macros to automatically format DAF information for their donor databases. In worst-case

scenarios, key gift information never makes its way to the database and gets passed around via Slack, spreadsheets, and email.

"You end up duct taping all of these things together," says James Misner, founder of the Kipos Group consultancy and a former World Relief fundraising executive.

Small Steps to Tame Data Chaos

Ask frontline fundraisers to make back-office jobs easier. At Pomona College in Claremont, Calif., gift officers guide donors through gift transactions to ensure needed information is relayed, particularly with DAF donations. "There has to be a shared understanding that gift processing is everyone's job," says Shalonda Martin, executive director of advancement services.

Find a consultant who works with nonprofits. Before turning to Jarman and Fundraising Nerd, Candlelighters nearly signed a consultant who worked chiefly on corporate tech. "She had no clue about how nonprofits work," Meltzer says. "I did end up spending some money with her, and it was just all for naught."

Don't cling to your technology. A tech tool that works wonders today may be eclipsed by a new product in a year, says Trish Davis of Susan G. Komen. "You have to be willing to stay nimble and not just do things the way they've always been done."

Look for technology that's flexible. "The way that people are donating is changing quickly," says Kristin Macek, director of advancement for Action Inc., a community-services group serving the Cape Ann region of northeastern Massachusetts. "And you need to have a tool that's going to be able to adapt to those changes."

The data disorder can wreak havoc on even the basic gift acknowledgment, says Michael Crisona, senior vice president of advancement at Blood Cancer United, formerly the Leukemia & Lymphoma Society.

"Data has to be a priority," Crisona says. "If it's not, the organization will suffer."

Experts say charities are struggling because their systems and tech often predate the digital-giving explosion. "It's so easy for money and information to move around now, and our systems really haven't kept pace with that," says Amanda Jarman, founder and president of Fundraising Nerd, a tech consultant for nonprofits.

Also, many donor-nonprofit intermediaries like DAFs and stock brokerages cater exclusively to the donor. "Their customer isn't the nonprofit," says Mitch Stein, chief strategy officer for Chariot, a DAF payment processor. "Their sales don't go up if they improve the nonprofit experience."

Tech Solutions to a Tech Problem

If technology created the back-office problems, tech answers may be on the way. Blood Cancer United is investing heavily in data expertise and talent, often hiring from for-profits. Data-management is no longer the work of interns and entry-level data-entry clerks, Crisona says.

Meltzer of Candlelighters recently turned to Fundraising Nerd to develop software so that gift information from an event-giving platform flows automatically into its donor database. Previously, a part-time administrative assistant — one of only five employees — manually entered the gift and donor information from the organization's bike-athon, which this year generated more than 1,000 transactions.

Silicon Valley is rushing products to market as well. Start-ups such as DonateStock, Funraise, and Overflow offer processing options for one or more asset types. The 5-year-old Infinite Giving — founded by Karen Houghton, who has worked in nonprofits and tech — built a donation platform that can accept cash but also donations of stock, crypto, and DAF funds. Infinite Giving is also a registered investment adviser and a fiduciary with a few hundred nonprofits.

Chariot — creators of the DAFPay widget through which donors make DAF gifts directly on a group's website — is rolling out a new product to link DAF providers and charities. It will serve almost as a clearinghouse: DAF sponsors will send Chariot gift data, and Chariot's tech will reconfigure the data for smooth integration and automatic delivery to the charity's database. No more spreadsheet macros.

Eventually, gift-processing platforms may become as essential as donor databases. The benefits? No more manual, tedious data management and more time to analyze giving patterns and steward donors.

"That's the future," says Stein of Chariot.