



# SS&C Intralinks and the ELCA Foundation: Building Lasting Donor Relationships

The ELCA Foundation, a ministry of the Evangelical Lutheran Church in America, provides an opportunity to make a lasting positive impact through philanthropy and charitable donations. With a wide variety of giving options and estate planning tools, donors can create a personalized plan that suits their financial circumstances and allows them to support the causes that matter to them the most.


## Situation

For non-profit organizations like the ELCA Foundation, managing donor relationships and compliance demands with limited resources can be challenging. The Foundation leverages Bridge Alternatives outsourced financial operations services to optimize its reporting and compliance workflows. Before Natalie Sandefur, managing director of investor solutions at Bridge Alternatives and chief operating officer at the ELCA Foundation, began supporting their fund management efforts, the ELCA Foundation was using an in-house portal to manage donor communications and reporting. Without support for APIs or integrations, the Foundation's staff had to go back and forth between accounting and contact-management platforms to deliver reports – a time-consuming and error-prone process.

"It was very difficult to use, and we often had login issues," says Sandefur of the previous portal. "Because it lacked important core

## Client Success Story

ELCA Foundation

Industry:   
Financial Services

### Streamlined fund management

Accounting and donor-services teams can easily manage documents and communications from one portal



### Dedicated support

Experienced team of data upgrade specialists ensure a smooth transition



### Portal branding features

White-labeling capabilities create a more personalized experience



capabilities, we were spending a lot of time, resources and money mailing quarterly statements to 3,000-plus people.” Leadership was eager to improve reporting workflows and donor relations by moving away from its legacy solution to a cloud-based platform that offered APIs and integrations. With over USD one billion in assets under management, the ELCA Foundation wanted to give its donors the best experience possible as they shape their personal legacies through charity.

## Solution

After conducting a thorough diligence process to ensure the platform met the ELCA Foundation’s needs, Bridge Alternatives decided to move ahead with InvestorVision. The firm’s staff were already familiar with Intralinks’ platform and reputation as an industry leader in fund management technology, which made InvestorVision an easy choice. “I had already used InvestorVision for years, so the ELCA Foundation was glad to have someone on their team that knew the portal,” says Sandefur. “Our own board of directors immediately approved the decision because they had also seen InvestorVision before and liked its look and feel.”

The platform allows the ELCA Foundation’s accounting and donor-services teams to easily manage documents and reports – and communicate directly with donors to answer any questions they may have while planning their gifts. Donors and recipient organizations can also access financial statements on-demand and track funds that are earmarked for specific causes or contingencies. With turnkey integrations and API support for the ELCA Foundation’s accounting and relationship-management tools, all documentation is accessible via InvestorVision’s intuitive interface.

## Results

Given the unique nature of the ELCA Foundation’s use case and limited staff knowledge of investor portals, the road to the final rollout could have been a bumpy one. However, Intralinks’ support team was attentive and responsive throughout the process, answering all questions for the

ELCA Foundation’s staff and ultimately enabling them to simplify day-to-day administrative tasks.

“I have to give kudos to Alex, our data upgrade specialist, and the entire Intralinks team,” says Sandefur. “A lot of this was completely new to the our staff during training, and his team was very professional and did a fantastic job working with this new concept.” The process went off without a hitch, and together over two weeks, they uploaded and mapped more than two years of documentation for 3,000 investors.

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## Benefits

Having completed their InvestorVision training courses, the ELCA Foundation team is now ready to roll out InvestorVision to its donors for the next round of quarterly statements. At that time, users will receive welcome emails and instructions on how to log on to the intuitive portal. “We’re looking forward to introducing InvestorVision’s slick appearance to our donors,” says Sandefur. “Being able to put our logo on the portal and make it look like ours really personalizes it.”

From rebranding the ELCA Foundation’s portal and ending its reliance on snail mail to reducing administrative work and resolving once-frequent login issues, the move to InvestorVision has already been transformative. “Being able to centralize donor emails and easily reset passwords makes a huge difference,” says Sandefur. And with a trusted fund management partner in Intralinks, she feels the ELCA Foundation is better positioned than ever to build lasting donor relationships.

*“As we continue to grow, we want donors to have a reputable, professional-looking portal like InvestorVision to go to.”*

**Natalie Sandefur**  
Chief Operating Officer, ELCA Foundation