EAB

Navigating the Advancement Technology Vendor Landscape

A Guide for Digital Transformation

February 2020

Tool

Formulate a digital strategy that balances strategic impact with implementation concerns for your advancement organization.

Advancement Forum

EAB

We help schools support students
from enrollment to graduation and beyond

› Find and enroll your right-fit students

› Support and graduate more students

› Prepare your institution for the future

ROOTED IN RESEARCH

7,500+ Peer-tested best practices

500+ Enrollment innovations tested annually

ADVANTAGE OF SCALE

1,500+ Institutions served

3.7 M+ Students supported by our SSMS

WE DELIVER RESULTS

95% Of our partners continue with us year after year, reflecting the goals we **achieve together**

K-12 | Community Colleges | Four-Year Colleges and Universities | Graduate and Adult Learning

Advancement Forum

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Advancement Technology Strategy Diagnostic

A Multifaceted Marketplace, Limited Shared Language

Vendors' Solution Functionalities Not Easily Comparable

Just as the business needs for university advancement present uniquely on every campus, a solution that's right for any given institution and its advancement organization will vary according to the institution's needs, capacity, finances, and skillset. But determining what's right for the institution is not simple; the advancement technology solution marketplace is evolving rapidly, and its continued pace of change has made development of a shared language for services difficult to establish.

With each new vendor that differentiates their product with quirky branding and distinct add-on product lines, the conversation for organizations looking to bring in new tools gets ever more complicated.

To help you make sense of the landscape, the following pages pull together some key facts and findings about technology vendors encountered in Advancement Forum research conversations. While not meant as recommendations or endorsements, these profiles provide an overview of the vendors and their products, as well as information regarding their users within higher education.

Criteria for Inclusion

Our vendor landscape is cultivated not to be exhaustive for any one type of solution, but rather to highlight the vendors and products that recurred in conversations with Advancement Forum Members during our research into digital strategy for advancement.

It therefore highlights some big-name brands in various functional product categories, but also some smaller and more advancement-specific vendors that may not appear in broader searches for technology solutions and platforms.

While Advancement Technologies can be Readily Divided into Discrete Functional Capabilities…

Constituent Relationship Management (CRM)

Centralized platforms to maintain and utilize constituent records

Online Giving & Crowdfunding

End-to-end solutions for web-based giving and formal giving days

Marketing Automation

Automatic tools for email/web content based on constituent behavior

Multichannel Communications

Enablers of text messaging and other constituent outreach mediums

Prospect Data Analytics

Tools for extracting insights from data to plan strategy

Fundraiser Workflow Management

Technology solutions for speeding up MGO task completion

Wealth Screening

Services for assessing wealth and capacity of prospect populations

Alumni Networking/Membership

Solutions for connecting alumni to each other and the institution

…Most Established Vendors Have Offerings that Span Multiple Functional Product Categories

Source: Advancement Forum interviews and analysis.

Intention Before Action

Choose a Path, Then a Vehicle

The latest and greatest technology being marketed to advancement leaders usually generates a great deal of buzz and enthusiasm, but that buzz is often unrelated to the business problem the technology solution purports to solve.

The first and most important step in digital transformation—but often the most overlooked step—is figuring out what your organization is trying to achieve before choosing a technology to help you achieve it. Your particular digital strategy should be directly related to the needs of your organization, not by the buzz surrounding the latest and greatest platform off the technology assembly line.

> **Figure out your business strategy before you invest in anything**. Leaders who aim to enhance organizational performance through the use of digital technologies often have a specific tool in mind. 'Our organization needs a machine learning strategy,' perhaps. But digital transformation should be guided by the broader business strategy.
>
> Benham Tabrizi, et al.
> *"Digital Transformation Is Not About Technology"*

Broader Business Strategy Guides Technology Selection

When evaluating tools, technologies, and staffing investments at your institution, we recommend you look at them in the light of three commonly applied strategic imperatives which advancement technology supports at best-practice institutions: better engaging constituents, making smarter decisions, and gaining operational efficiency.

Strategic Imperatives	Intended Outcome
Migrate the **Constituent Experience** onto Digital Platforms	*Better Interactions* High-calibre experiences
Leverage Big Data to Drive Enterprise-Wide **Decision-Making**	*Better Decisions* High-ROI plans of action
Automate **Workflows and Processes** Across Departments	*Better Operations* High-efficiency teams

1) Wealth calculations exclude primary residence.

Source: "Digital Transformation Is Not About Technology", *Harvard Business Review,* March 2019; Advancement Forum interviews and analysis.

Align Strategy with Technology Capabilities

Connect Business Strategy to "Need-to-Have" Functional Technology Capabilities

With limited resources to invest in technology solutions, finding the optimal technology solution to support your institution's fundraising strategy is no easy task. Prioritizing which strategies are most important to the organization will provide guidance as to which product functionalities are "need-to-have", and which are "nice-to-have". Leaders of best practice institutions ensure that the strategic goals of their organization are the focus of discussion with any new technology resources.

While fundraising strategies are naturally formulated in response to a host of external factors, we find that connecting how technologies may be used functionally to the strategic goals of those functions to be a worthwhile exercise when evaluating new technology products. Advancement Forum research has highlighted a wide variety of technology-based best practices in higher education advancement, touching on all of the functional areas covered in this document.

Strategic Goals at Best Practice Institutions	Functional Product Category
Improve operational efficiency in updating, maintaining, and utilizing constituent records	✔ ***Constituent Relationship Management***
Provide high-caliber online giving experiences for constituents	✔ ***Online Giving & Crowdfunding***
Automate marketing workflows across the organization	✔ ***Marketing Automation***
Enhance and integrate constituents' digital experiences across vital communication channels	✔ ***Multichannel Communications***
Leverage constituent data from disparate sources to drive enterprise-wide decision making	✔ ***Prospect Data Analytics***
Improve fundraiser workflow efficiency by speeding up internal, administrative, or rote tasks	✔ ***Fundraiser Workflow Management***
Integrate wealth screening data into constituent records quicker and more efficiently	✔ ***Wealth Screening***
Engage time-pressed, but eager, alumni with two-way digital micro-engagements	✔ ***Alumni Networking / Membership***

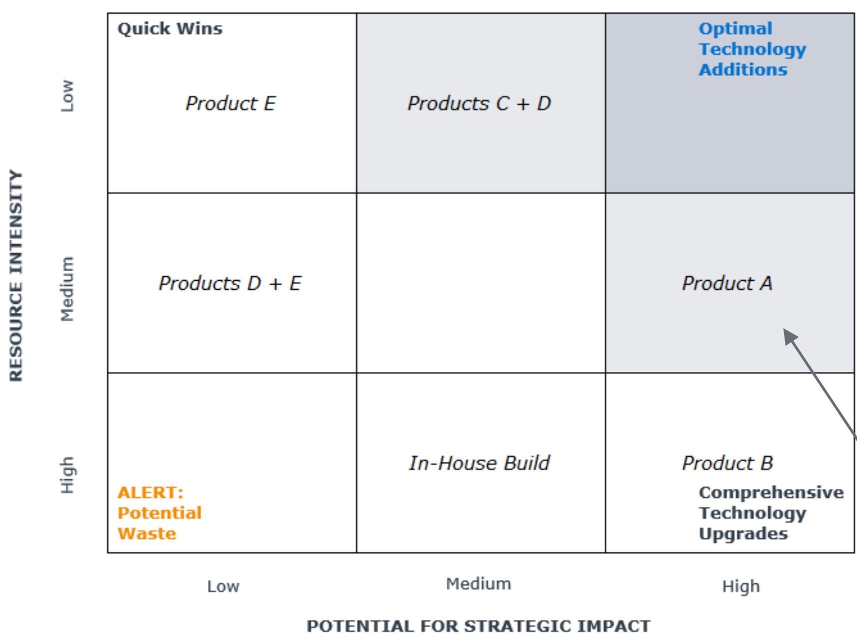
Evaluate Tech Products Across Functional Areas

Prioritize Options with an Advancement Technology Prioritization Exercise

With limited resources to invest in technology solutions, advancement leaders must ensure their technology budgets drive strategic impact—whether through providing high-caliber digital experiences to constituents, automating workflows and processes, or leveraging data to drive enterprise-wide decisions.

Use the below decision framework to determine how best to invest resources in technology solutions to maximize strategic impact.

Technology Solution Option (*example*)	Product Page #	Strategic Impact	Resource Intensity
Product A	*15*	*High*	*Medium*
Product B	*22*	*High*	*High*
Products C + D	*35 & 41*	*Medium*	*Low*
Product E	*54*	*Low*	*Low*
Products D + E	*41 & 54*	*Low*	*Medium*
In-House Build	*N/ A*	*Medium*	*High*



Rate options by their potential for strategic impact, evenly split between options rated High, Medium, and Low.

Rate options by their resource intensity, evenly split between options rated High, Medium, and Low.

Plot the results on the matrix according to your potential impact and resource intensity rankings. Options with the optimal strategic impact relative to their resource intensity will appear in the shaded area in the upper right of the table.

Constituent Relationship Management (CRM)

Primary Providers

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Slate 21
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Criteria for Inclusion

Centralized constituent relationship management platforms often serve as the database of record for all prospects, with the ability to house data on nearly every aspect of their relationship with this institution. These platforms allow a range of advancement staff to update, maintain, and utilize constituent records in service of meeting fundraising objectives.

Blackbaud CRM

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Blackbaud CRM is Blackbaud's comprehensive Constituent Relationship Management solution (CRM) for large enterprise-sized fundraising operations. It allows your team to prioritize prospects, manage gift proposals, oversee donor cultivation, and perform other advancement processes and operations.

After numerous acquisitions of fundraising technology products in recent years, including AcademicWorks, Target Analytics, JustGiving, and Reeher, Blackbaud's product line now spans a range of advancement shop operations including online giving, scholarship management, gift processing and others.

65 Fairchild St.

Charleston, SC 29492

(800) 443-9441

https://www.blackbaud.com/products/blackbaud-crm

Key Product Facts

Blackbaud CRM serves as a fully-customizable, mobile-ready, central platform for uploading and housing information about constituents, managing relationships with multichannel marketing, and learning more about constituent populations with analytics and reporting tools. Its key capabilities include:

- A centralized constituent data management solution that supports strategic relationship development, coordination between teams to define responsibilities, and saves time spent uploading or sharing constituent information;
- A native prospect research solution helps understand philanthropic giving trends, wealth capacity, and constituent behavior with customized modeling solutions;
- Integrated multichannel marketing capabilities such as a website content management system as well as online giving and peer-to-peer fundraising tools.
- Event management capabilities include registration tools, calendars, and communication tools.

Reported Results and Case Profiles

According to Blackbaud, The University of Georgia saved $3 million on labor costs, $400,000 in IT costs, and saw a fundraising increase of $14.3 million after deploying Blackbaud CRM.

Higher Education Clients

Blackbaud counts more than 3,000 clients in the education sector, including K-12 schools, higher education institutions, and related nonprofits. Blackbaud reports that its Blackbaud CRM clients in higher education include: University of Georgia, University of Oxford, and University College London.

Source: https://www.blackbaud.com/products/blackbaud-crm

Ellucian CRM Advance

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
✔	Online Giving & Crowdfunding
✔	Marketing Automation
✔	Multichannel Communications
✔	Prospect Data Analytics
✔	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Ellucian is an established education software provider that offers enterprise solutions for use across the university campus — from enrollment to advising to alumni relations. Its solutions are integrated through a proprietary data sharing protocol that enables disparate Ellucian enterprise systems to easily push and pull data from one another.

The latest version of Ellucian CRM Advance is deployed in a Software as a Service (SaaS) model. Its dynamic cloud-based products function under a robust security overlay on any device and seamlessly update with new features and capabilities. More than 1,400 institutions subscribe to Ellucian's cloud services and SaaS offerings in a variety of university settings.

2003 Edmund Halley Drive, Suite 500

Reston, VA 20191

(800) 223-7036

https://www.ellucian.com/Software/Ellucian-CRM-Advance/

Key Product Facts

As a central repository for all constituent information, Ellucian CRM Advance supports a full range of development campaigns involving prospects across the entire giving pyramid. Its core features include:

- Customized reporting and role-based dashboards to give real-time insight into development officers' progress toward multi-year capital campaign and other advancement goals;
- Prospect research management features to give advancement services and prospect research teams insight into prospect qualification, segmentation, and participation metrics;
- Analytics to inform personalized communication and cultivation strategies for existing donors and to help identify new potential donors;
- Cloud-based service to reduce disruption from maintenance and downtime;
- A mobile user interface, accessible from any device, that speeds up workflows by allowing frontline fundraisers to access information on the go.

Higher Education Clients

Ellucian reports that it works with more than 750 higher education institutions. Higher education advancement organizations using Ellucian CRM Advance include: Yeshiva University and Dalhousie University.

Source: https://www.ellucian.com/solutions/ellucian-crm-advance

e2s Connect

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Engage2serve (e2s) has been serving the higher education market for more than a decade with student lifecycle solutions and consulting. The company maintains offices in the US, UK and Singapore.

The company's flagship product, the Student Lifecycle CRM, focus on distinct aspects of the student lifecycle with its three modules: e2s Recruit (Enrollment CRM), e2s Retain (Success CRM), and e2s Connect (Alumni CRM). It also provides other products and services for campus productivity in areas such as career services and attendance management.

2802 Flintrock Trace, Suite 306
Austin TX 78738
(512) 861-4141
http://www.engage2serve.com/e2s-connect.html

Key Product Facts

The Alumni CRM, e2s Connect, is part of the company's flagship Student Lifecycle CRM. It provides a college-branded mobile app for students to remain connected to their university after graduation. Advancement office staff using the platform are able to take advantage of features that help nurture the relationship between alumni and the institution, keeping track of all communication along the way. Key features include:

- Multichannel outreach and content management systems to run fundraising campaigns targeting alumni communities using persona-based engagement pathways;
- Event management tools which allow staff to set up and promote events for target alumni groups, with invite, RSVP, event tracking, and post-event feedback capabilities;
- Alumni community building tools for use by alumni, including discussion forums, job boards and a mentoring platform, and easy integration to popular social networks like LinkedIn and Twitter to further facilitate digital networking among alumni;
- App-based online giving, with pledge tracking, and payment processing.

Higher Education Clients

Across Engage2Serve's three products, its clients include: Middlesex University, University of London, North East Surrey, University of Sunderland, and West Los Angeles College.

Source: http://www.engage2serve.com/e2s-connect.html

Jenzabar Advancement

	Product Capabilities/Functions
✔ (primary)	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Jenzabar was founded in 1998 as an eLearning portal for students and faculty. It has now grown into a global enterprise software company that serves higher education institutions.

The company now supports administrative offices and academic departments across campus with its software solutions. Its Jenzabar One product suite includes modules ranging from human resources administration to eLearning to advancement. Its advancement module is called Jenzabar Advancement.

In addition to its technology products, the company also offers consulting and services related to student success and information technology.

101 Huntington Avenue, Suite 2200
Boston, MA 02199
(800) 593-0028
https://www.jenzabar.com/advancement

Key Product Facts

Jenzabar Advancement provides a comprehensive suite of tools to give advancement staff an intuitive, flexible, and mobile-ready environment to tackle a wide range of advancement activities, from prospect identification and cultivation to stewardship and donor retention. Its main features include:

- Email marketing tools to employ audience segmentation, target email campaigns, and automated nurture campaigns;
- Constituent data profiles which include biographic, demographic, giving behavior, and information on interests such as involvements, relatives, and associations;
- Campaign management capabilities that provide easy access to key statistics and staff and volunteer assignments, giving leaders the information they need to adjust resources and strategies;
- Planned giving records which track all activities, attributes, and individuals associated with most common types of planned gifts;
- Grant management for maintaining all grant information, from proposals to active grants;
- Scholarship management to track endowed and annual scholarship information, such as donors, donations, requisites for awards, amounts available for awarding, and recipient information.
- Phonathon support features ranging from call assignment to information and pledge tracking.

Higher Education Clients

In the worldwide higher education market, Jenzabar works with over 1,300 higher education clients, including: Texas Lutheran University, Methodist University, Southeastern University, Cambridge College, Goodwin College, Arkansas Northeastern College, and Judson University.

Source: https://www.jenzabar.com/solutions-for-higher-education/advancement

PeopleSoft Contributor Relations

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Oracle was founded in 1977 and after a long list of acquisitions, including PeopleSoft in 2005, has become one of the largest database management companies in the world.

Among its products and services is Oracle's higher education advancement technology offering, PeopleSoft Contributor Relations. This constituent relationship management offering is just one of many software solutions Oracle provides to higher education institutions.

PeopleSoft Contributor Relations is part of the Campus Solutions Suite of products, which also includes PeopleSoft Student Administration, PeopleSoft Campus Self Service, and PeopleSoft Gradebook.

500 Oracle Parkway

Redwood Shores, CA 94065

(800) 392-2999

https://www.oracle.com

Key Product Facts

PeopleSoft Contributor Relations provides a full suite of CRM tools to cultivate relationships, analyze results, manage programming, and spur constituent involvement. Key features include:

- Donor cultivation and retention functionalities include the ability to capture and maintain comprehensive constituent data with contact, biological data, giving history, complete communication record, and known affiliations with campus groups and organizations;
- Prospect management features allow users to assign resources and create strategies for prospective donors as well as create actions for staff and volunteers, including cultivation steps and contact reports;
- Tools to manage campaigns and events against strategic goals by analyzing attendance, resource costs, and fundraising results;
- Volunteer and membership management tools allow staff to track, manage, and evaluate all volunteer activity;
- Gift processing and tracking features provide insight into results of fundraising efforts, providing valuable input for adjusting campaign strategies, communications, and programming;
- Donor-facing information portals supply constituents with robust information about their relationship with the institution, including contributions, transactions, and other information.

Higher Education Clients

EAB was unable to identify higher education institutions using PeopleSoft Contributor Relations software.

Source: https://www.oracle.com

Raiser's Edge NXT

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Blackbaud's flagship advancement technology product, the popular Raiser's Edge NXT, is a comprehensive Constituent Relationship Management tool (CRM). It allows your team to prioritize prospects, manage gift proposals, oversee donor cultivation, and perform other advancement processes and operations.

After numerous acquisitions of fundraising technology products in recent years, including AcademicWorks, Target Analytics, JustGiving, and Reeher, Blackbaud's product line now spans a range of advancement shop operations including online giving, scholarship management, gift processing, and others.

65 Fairchild St.

Charleston, SC 29492

(800) 443-9441

https://www.blackbaud.com/products/blackbaud-raisers-edge-nxt

Key Product Facts

Raiser's Edge NXT launched in 2015 as the latest iteration of Blackbaud's cloud-based fundraising management platform for small- to mid-sized fundraising organizations. The product provides an all-in-one solution for most aspects of advancement services and communications work. Its core value proposition lies in the ability for different processes, communications, and data sources across the organization to be consolidated in one place, accessible to staff on any device.

Its core capabilities include:

- Integrated multi-channel constituent outreach tools;
- Role-based work centers that can track individual and team performance;
- Built-in analytics which can find top prospects or lapsing donors and estimate suggested ask amounts for each;
- Data management and enrichment services to populate missing donor data;
- Intuitive reporting capabilities with drag and drop functionality for tracking key productivity metrics;
- Mobile-ready applications for use on any device.

Higher Education Clients

Blackbaud counts more than 3,000 clients in the education sector, including K-12 schools, higher education institutions, and related nonprofits. Blackbaud reports that its Raiser's Edge NXT clients in higher education include: the University of York and The University of Central Missouri Alumni Foundation.

Source: https://www.blackbaud.com/products/blackbaud-raisers-edge-nxt

Salesforce for Advancement

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Salesforce was founded in 1999 and Salesforce.org was created in 2008 as a nonprofit reseller of Salesforce technology to educational institutions and nonprofit organizations. The Salesforce.org education cloud is a set of solutions for higher education institutions. They include three areas of focus: recruitment and admissions, student success, and advancement.

Salesforce for Advancement is a CRM that consolidates data from disparate systems and automates time-consuming tasks, allowing staff to focus their time on strategic priorities and their relationships with alumni.

415 Mission Street, 3rd Floor

San Francisco, CA 94105

(647) 258-3800

https://www.salesforce.org/highered/advancement-software/

Key Product Facts

The Salesforce for Advancement platform has been built to provide value to advancement shops by increasing fundraising efficiency, making it easier to establish and maintain alumni relationships, and keeping staff accountable with detailed reporting. Its key features include:

- Alumni engagement and relations tools to create unique initiatives to engage alumni, from mentorship opportunities to corporate relations outreach;
- Personalized communications tools informed by holistic tracking of alumni conversations across communications channels, such as social media, email, and web;
- Support for Giving Day activities, such as advanced gift processing, and a range of outreach tools including social media, email, and web to maximize campaign visibility;
- Fundraising tracking tools, for both annual giving and major gifts, with real-time dashboards to provide information on the status of appeals, campaign effectiveness, and ROI;
- Mobile-ready features to support moves management and donor strategy, such as centralized communication logs, gift tracking, task management, and predictive analytics;
- Event management capabilities for teams to manage event calendars, RSVPs, table seating charts, check-ins, and create event summary reports.

Reported Results and Case Profiles

According to Salesforce, its clients have reported a 9% rise in alumni engagement, a 16% rise in donor conversion, and a 31% rise in campaign ROI.

Higher Education Clients

Salesforce.org reports that is Salesforce for Advancement clients include: Georgetown University, Columbia University, Pepperdine University, University of Southern California, Worcester Polytechnic Institute, Florida Polytechnic University, and Westmont College.

Source: https://www.salesforce.org/highered/advancement-software/

Slate

Product Capabilities/Functions	
✔ (primary)	Constituent Relationship Management
✔	Online Giving & Crowdfunding
✔	Marketing Automation
✔	Multichannel Communications
✔	Prospect Data Analytics
	Fundraiser Workflow Management
✔	Event Management
	Wealth Screening
✔	Alumni Networking/Membership

Primary Capability/Function

Secondary Capabilities/Functions

Vendor in Brief

Slate was introduced by Technolutions as its flagship information management system in 2000. As the company's higher education customer base has grown, the software has evolved into a comprehensive cloud-based CRM solution. Slate is used primarily in admissions offices, but all Slate licenses include access to the entire array of product features used by admissions and advancement offices. In recent years, some advancement offices have also adopted Slate.

The company holds the Slate Innovation Summit annually, which covers emerging practices in admissions, advancement, and higher education from thousands of attendees.

234 Church Street, 15th Floor

New Haven, CT 06510

(203) 404-4835

https://technolutions.com/

Key Product Facts

In addition to having two-way integrations with popular databases of record from Ellucian, Jenzabar, PeopleSoft, and others, Slate provides admissions and advancement staff with a full range of constituent relations management features, including:

- Email and text messaging functionalities which allow staff to use dynamic email templates and SMS texts to target mobile users;
- Mobile portals and forms for data collection, which can be constructed with a drag-and-drop builder and set up to automatically integrate their data with student records;
- A giving module to provide gift management functionality, such as capturing and tracking gifts, pledges, scholarships and proposals;
- Real-time reporting and predictive modeling to aid decision making;
- Event and travel management features that allow users to plan with customizable templates and send out automated communications and reminders;
- A built-in payment processing platform, which can be used to accept payments by credit card, debit card, and electronic check, or be directly integrated with popular payment processing platforms.

Higher Education Clients

Although the enrollment CRM is their flagship product, all 850+ Slate clients are granted access to all features and capabilities, including those for advancement. Its clients include: University of Oklahoma, Duke University, Carnegie Mellon University, Harvard Business School, University of Massachusetts Amherst, and University at Buffalo.

Source: https://technolutions.com/

Talisma Fundraising

	Product Capabilities/Functions
✔ (primary)	Constituent Relationship Management
✔	Online Giving & Crowdfunding
✔	Marketing Automation
✔	Multichannel Communications
✔	Prospect Data Analytics
✔	Fundraiser Workflow Management
✔	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Campus Management was founded in 1998, supplying software to private for-profit colleges. In 2008 the company was acquired by a private equity firm and merged with India-based software provider Talsima, where the company maintains a substantial presence.

Its flagship enterprise solution is CampusNexus, which is comprised of modules that span multiple administrative functions of higher education — including student success, finance, payroll, HR and operations. Its donor management software is called Talisma Fundraising.

Talisma Fundraising implementations are supported by an array of specialists to ensure smooth roll out for clients.

5201 Congress Ave.
Boca Raton, FL 33487
(561) 923-2500
https://www.campusmanagement.com/products/donor-management-software/

Key Product Facts

Talisma Fundraising donor management software, a software module distinct from the Campus Nexus CRM, has been designed to unite databases and information silos to provide a complete and up-to-date view of all constituents. Its key features include:

- Unified constituent records management system that consolidates contact information, giving summaries, and communications histories.
- Comprehensive reporting tools which provide summaries for campus-wide advancement efforts including annual giving, capital campaigns, and disparate solicitation efforts;
- Moves management and event management capabilities to optimize every constituent touchpoint;
- Automated accounting features improve fund accounting operations and processes in four key areas; grants, funding, encumbrances, and commitments.

Higher Education Clients

Campus Management reports that higher education institutions using its advancement software include: Arkansas State University, Mercer University, Baker University, Central Pennsylvania College, Western Colorado University, and St. Cloud State University.

Source: https://www.campusmanagement.com/products/donor-management-software/

Online Giving & Crowdfunding

Primary Providers

Bonfire . . . 25
Experiment . . . 26
Fundly . . . 27
GiveCampus . . . 28
GiveGab . . . 29
GoFundMe Charity . . . 30
Hubbub . . . 31
iModules . . . 32
MobileCause . . . 33
Scalefunder . . . 34
Useed . . . 35

Criteria for Inclusion

Dedicated online giving solutions typically provide end-to-end capability for web-based giving, formal giving days, and even some tools for organic crowdfunding campaigns on campus. More comprehensive technology platforms also incorporate online giving capabilities into their product offerings.

Online Giving & Crowdfunding

Other products provide capabilities and functions for online giving, crowdfunding, and giving days as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

Blackbaud CRM. 14
Constant Contact. 39
e2s Connect. 16
Ellucian CRM Advance. 15
EverTrue. 63
Jenzabar Advancement 17
NetCommunity. 85
PeopleSoft Contributor Relations. 18
QuadWrangle. 53
Raiser's Edge NXT. 19
Slate. 21
Talisma Fundraising. 22

Bonfire

Product Capabilities/Functions	
	Constituent Relationship Management
✔	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Bonfire is a design and technology specializing in custom apparel. It was founded in 2012 to help organizations raise money by creating custom shirts and selling them in fundraising campaigns. Its shirts come in a variety of styles and colors for men and women. All of the company's apparel is created using premium fabrics.

Bonfire's service can be used by advancement staff, students, or other university administrators within other departments who are responsible for supporting causes with grassroots fundraising campaigns.

W Broad St.

Richmond, Virginia

https://www.bonfire.com/

Key Product Facts

Bonfire's platform has been constructed to serve as a single location that can support t-shirt fundraising campaigns from end to end. The platform supports users at every stage of the campaign process. Campaign features and capabilities include:

- A design platform for users to create or upload apparel designs quickly using an easy-to-use web-based design tool;
- Inventory-free distribution provided by the Bonfire platform, which allows users to purchase custom apparel or sell shirts individually online without the need to carry any inventory themselves;
- Social media sharing functionality to allow purchasers to spread the word about the campaign;
- An online dashboard on which staff can view and collect 100% of the profits raised.

Pricing

Bonfire Campaigns are free for fundraisers to launch, with no upfront costs required. Costs for the campaign such as the base cost for manufacturing, sourcing, printing, shipping, as well as a donation fee of 8% for all direct donations to the campaign through Bonfire's platform are deducted from the campaign profits before payout.

Higher Education Clients

Bonfire reports that it has provided support for fundraising campaigns at William and Mary and Virginia Commonwealth University.

Source: https://www.bonfire.com/

Experiment

	Product Capabilities/Functions
	Constituent Relationship Management
✔	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Experiment was founded in 2012 as an online platform for discovering, funding, and sharing scientific research. Its searchable database allows individual donors to browse through scientific projects in need of funding.

Experiment is often used by researchers to replace small grants that would fund early-stage research. It has been used directly by researchers — with or without coordination from their institutions — at many higher education institutions in North America.

New York, NY

https://experiment.com/

Key Product Facts

Experiment's platform allows backers to fund projects of their choosing by making donations. Every project must be reviewed and approved. All projects are listed with a description as well as a fundraising goal. When a project reaches its funding goal, all donors are charged and the project organizer can then receive the payout. If a project does not reach its funding goal, none of the donors are charged. Key features of the Experiment platform include:

- The Experiment platform allows donors to search for projects, or browse by discipline, cause or institution.
- Experiment's open lab notebook allows research teams to share their results with donors.

Pricing

It is free to start a project, but Experiment charges an 8% platform fee of all donations once a project is fully funded as well as payment processing fees of 3-5%.

Reported Results and Case Profiles

According to Experiment, the platform has seen 45% of projects get fully funded.

Higher Education Clients

Experiment has been used at a total of 237 higher education institutions, including: University of Washington, Auburn University, Stony Brook University, Kansas State University, Purdue University, Texas A&M University, Harvard University, and Duke University.

Source: https://experiment.com/

Fundly

Product Capabilities/Functions	
✔ (secondary)	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Fundly was founded in 2009 with the goal of empowering people and organizations to support and nurture the causes they care about. Its crowdfunding platform (Fundly/Fundly Pro) is used by individuals and nonprofits to fundraise for a variety of causes.

Its product suite goes beyond a crowdfunding platform for individuals to include solutions for larger enterprises as well. The Fundly CRM product suite includes tools for donor management, volunteer management, and online giving solutions.

1300 Valley House Dr, Suite 100-41 Rohnert Park, CA 94928

(707) 929-3563

https://fundly.com/

Key Product Facts

Fundly's crowdfunding platform allows individuals or organizations to create campaign pages, publicize them through email and social media and collect funds from donors.

Fundly CRM's features allow larger fundraising organizations to build stronger connections, personalize communication and fundraising strategies, and keep leadership informed. Its key features include:

- Donor management to provide access to real-time information like giving history, campaign participation, and event attendance in a customizable dashboard that allows staff to easily track engagement with the institution;
- Events dashboard to view registration trends, event registration forms, ticketing, merchandising, expenses, and event revenue designation;
- Task and interaction management tools to allow flexible tracking, interaction notes calendaring, email notifications of tasks;
- A volunteer management solution for coordination of volunteer event participation, allowing users to list their events the Fundly Connect database;
- An online giving solution that enables organizations to create mobile-ready fundraising pages with multimedia content, email constituents with campaign-themed email templates and process donations.

Pricing

- Pricing for the FundlyCRM family of products is based on the total number of contacts. With set prices from $600 to $6,000 per year (for 1000 contacts to 50,000 contacts, respectively.) Additional blocks of 50,000 contacts can be purchased on an annual subscription basis for institutions with between 50,000 to 250,000 contacts (alternate pricing for customers with more than 250,000 contacts is available).

Source: https://fundly.com/

GiveCampus

Product Capabilities/Functions	
	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

GiveCampus, which launched in 2014, is a social fundraising and engagement platform for nonprofit educational institutions. The company's mission is to advance the affordability and accessibility of education. It serves the company mission by providing software, services, and expertise to help schools improve their fundraising operations.

Advancement offices at higher education institutions have used GiveCampus for a range of fundraising objectives, including: giving days, short-term challenges, reunions, senior class gifts, annual fund campaigns, capital projects, scholarships and endowments, year end drives, and athletics development.

80 M Street SE

Washington, DC 20003

https://www.givecampus.com/

Key Product Facts

GiveCampus is a third-party social fundraising and engagement crowdfunding platform that allows users to craft a range of digital fundraising initiatives and social media messaging strategies to engage donors. The platform has three main components: the social fundraising platform, giving forms, and a volunteer management system. These tools include a variety of features, including:

- Giving forms that can be customized and tailored for each donor segments;
- Real-time reporting, appeal tracking, and analytics for the institution to collect, view, and analyze campaign performance data;
- User-friendly giving forms take less than 60 seconds to complete from any device with the capability for automated record matching with the institution's database;
- A dedicated volunteer management platform that provides real-time insight on outreach for volunteers and staff and organizes that data and resources volunteers need.

Higher Education Clients

More than 500 educational institutions, including K-12 institutions as well as colleges and universities. Its higher education clients include: William & Mary, College of the Holy Cross, Johns Hopkins University, Davidson College, Fordham University, Meredith College, St. Edward's University, Colby College, and Marquette University.

Source: https://www.givecampus.com/

GiveGab

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

GiveGab started in 2011 as a social platform to help nonprofits and volunteers connect to each other. It later evolved into a company that focuses on helping nonprofits acquire and engage more supporters. In January 2018, GiveGab acquired online fundraising firm Kimbia, nearly doubling its staff.

It now serves both smaller and larger nonprofits with an enterprise product line that is used by advancement teams at a number of major North American colleges and universities.

119 S. Cayuga St., Ste 303
Ithaca, NY 14850
570-313-6724
https://info.givegab.com/

Key Product Facts

The GiveGab Enterprise nonprofit fundraising platform contains a range of online giving features and functions. Its features include:

- Custom forms, which provide a way for collecting donations with branded, secure, and easily deployable giving solution, including a feature to auto-populate donors' credit card information;
- Ways to track and analyze engagement data, such as custom notes, giving history, and other metrics;
- The ability to create fundraising campaigns and events for staff and ambassador constituents, giving them the ability to manage their own campaigns and content;
- Custom event pages to manage events with a check-in feature that can collect donations or further information from event participants;
- Reporting capabilities, including ad-hoc reports or prescheduled reports, from the donation form, campaign, organization, or chapter/affiliate level.

Reported Results and Case Profiles

In its first Giving Day using the GiveGab platform Cornell secured 1,400 new student and alumni donors.

Higher Education Clients

Give Gab reports that its higher education client base includes: Cornell University, City University of New York, Purdue University, University of Maryland, University of Montana, University of Iowa, Nicholls State University, and Canisius College.

Source: https://info.givegab.com/

GoFundMe Charity

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

GoFundMe Charity, formerly CrowdRise, is used by more than 30,000 charities, events, and brands to raise money from supporters. It works with both small and large nonprofits as well as with complex fundraising organizations with multiple chapters or associations.

GoFundMe Charity's solutions for higher education advancement include online social fundraising and peer-to-peer fundraising, both of which utilize the power of technology, story telling, and social connectivity to encourage charitable giving. These online fundraising solutions can be integrated with Salesforce and other popular donor management software solutions.

Redwood City, CA

https://charity.gofundme.com/

Key Product Facts

The Online Social Fundraising platform allows user to create branded, mobile-ready fundraising campaigns and provides connections to popular social media sites like Facebook and Twitter as well as text and email functions to allow fundraisers to promote their causes. Other features include:

- Video update tool to update campaign donors with video, text, and images;
- Offline donation management that allows staff to add in offline donations associated with campaigns;
- Data and reporting can analyze event performance, gather new donor information, and produce reports at the donor, fundraiser, and organization level.
- Donor-facing giving options such as tax-deductible donation receipts and the option to cover donation fees are available;
- A peer-to-peer fundraising solution allows donor fundraisers to create their own campaigns using the organization's branding and logo.

Higher Education Clients

EAB was unable to identify higher education institutions using GoFundMe Charity software.

Source: https://charity.gofundme.com/

Hubbub

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Hubbub's mission is to scale good causes by bringing fundraising into the digital, social age.

Hubbub's platform focuses on improving the online giving and engagement experience for giving day campaigns, social ambassadors, and crowdfunding.

70 Canal Street

Stamford, CT 06902

(203) 315-8349

https://www.hubbub.net/

Key Product Facts

The Hubbub platform has three products focus areas: giving day campaigns, social ambassadors, and student crowdfunding. The platform's capabilities include:

- Hosting on secure Amazon AWS servers, which are 100% mobile responsive, and can be customized to fit their clients' branding and desired configuration;
- Automated emails sent directly from the platform to steward donors and communicate with social ambassadors;
- Social analytics to help recruit, manage, and incentivize ambassadors and volunteers by measuring their individual impact on awareness of the institution and its fundraising campaigns;
- The ability for engaged individuals to create their own projects, enabling peer-to-peer fundraising that can be moderated by the institution's staff prior to going live;
- Integration with popular data sources, such as Google Analytics integration to track conversion rates, and donor data from Hubbub can be exported to CRMs.

Higher Education Clients

Hubbub works with a third of the UK's university fundraising offices and others around the world, including Texas Christian University, University of Essex, University of York, University of Southampton, Durham University, London Business School, and the University of London.

Source: https://www.hubbub.net/

iModules

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

iModules was founded in 2002 to focus on the website and communication needs of colleges and universities. It has since grown into a market leader providing a variety of solutions to membership-based associations and annual giving teams at educational institutions.

Capabilities within the iModules suite have been designed for use by fundraising, alumni relations, advancement services, and advancement communications departments. These modules form an integrated solution for constituent engagement management that includes web content management, marketing communications, online giving, event management, ecommerce, and social media integration.

5101 College Blvd.
Leawood, KS 66211
(913) 888-0772
https://www.imodules.com/

Key Product Facts

The iModules Encompass suite of online engagement solutions has expanded to now span nearly all constituent touchpoints with the institution. Features include:

- An email marketing tool to deliver targeted messages and track performance;
- Membership management tools like automated renewals and dues processing;
- Online giving pages that provide insight for fundraising campaign management and secure processing of online donations;
- Database management tools to integrate with common databases of record, providing the capability for the iModules platform to serve as a repository for constituent data to be used in marketing communications;
- Integrated social media management tools to provide means of automated communications and outreach on popular platforms.

Reported Results and Case Profiles

- University of Portland launched a new giving website with iModules in 2016, leading to the largest number of gifts and largest total donation amount ever received on Giving Tuesday.
- After a complete website redesign, Oklahoma State University's Alumni Association website increased total sessions by 6% and decreased its bounce rate (leaving a website landing page without browsing further) from 54% to 5% after the redesign.

Higher Education Clients

More than 800+ higher education institutions, including Northwestern University, University of Pennsylvania, Fordham University, Gonzaga University, Oklahoma State University, University of Missouri, University of Tennessee, Western Kentucky University, and Webster University.

Source: https://www.imodules.com/

MobileCause

Product Capabilities/Functions	
	Constituent Relationship Management
✔ (primary)	Online Giving & Crowdfunding
	Marketing Automation
✔ (secondary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

MobileCause, founded in 2008, partners with nonprofit organizations to help them acquire new donors, retain existing donors, and inspire recurring donations through increasing and optimizing their web presence.

The value proposition of MobileCause's product is to leverage the power of technology to enhance conventional fundraising and communication efforts, such as in-person events or direct mail pieces, to increase cause visibility and donor engagement.

27001 Agoura Road 350A

Calabasas, CA 91301

999-661-8804

https://www.mobilecause.com/

Key Product Facts

MobileCause's online and event fundraising software has the following key features and capabilities that can be used in tandem with an organization's pre-existing communication efforts:

- Capabilities for supporter-led fundraising on behalf of the organization through peer-to-peer or crowdfunding campaign platforms;
- Event management features including integrated registration, ticketing, and RSVP management, with support for automated text message invitations and reminders as well as the ability to collect mobile pledges;
- Volunteer management tools such as sign ups, petitions, memberships, and surveys;
- Mobile-friendly donation pages and text-to-donate keywords for donors to participate in campaigns via phone;
- Two-way text message capabilities for event promotion, campaigns, and volunteer opportunities.

Price

MobileCause has a tiered pricing model, ranging from $149/month to $499/month depending on the size of the organization and product features included.

Higher Education Clients

In addition to a client base of nonprofit organizations, MobileCause also reports that it works with higher education institutions such as: Wilmington College, California State University Monterey Bay, Northwood University, Gonzaga University, University of Southern California and Jackson State University.

Source: https://www.mobilecause.com/

ScaleFunder

Product Capabilities/Functions	
	Constituent Relationship Management
✔	Online Giving & Crowdfunding
	Marketing Automation
✔	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

ScaleFunder, owned and operated by Ruffalo Noel Levitz since 2014, is the primary digital arm of the company's suite of fundraising solutions. The tool is employed by annual giving teams to amplify its fundraising efforts over digital channels such as social media to raise money for an array of causes. The company's products include both crowdfunding and giving day modules that allow its customers to raise money from constituents online.

ScaleFunder also offers its customers strategic planning advice and support from digital fundraising experts on staff to help maximize the results from digital fundraising campaigns.

1025 Kirkwood Parkway SW

Cedar Rapids, IA 52404

(319) 362-7483

http://www.scalefunder.com/

Key Product Facts

ScaleFunder's Giving Day and crowdfunding platforms are designed to give a dynamic online experience to constituents and provide staff with tools to effectively manage volunteers. The platform's key capabilities include:

- Real-time updates and tracking for donation matches and ROI to motivate constituents and ambassadors;
- Multichannel communications tools like social media posting and emails for creating challenges and incentives;
- Integration with existing payment processers;
- A white-labeled platform with a custom vanity URL;
- Review of reports with digital fundraising experts.

Higher Education Clients

The company reports that it has more than 150 clients in nonprofit and higher education fundraising. Higher education clients reported include: Cornell University, Duquesne University, University of Maryland, Northwestern, University of Texas Austin, and University of Mississippi.

Source: http://www.scalefunder.com/

Useed

Product Capabilities/Functions	
	Constituent Relationship Management
✔	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Useed is a certified B-corporation founded in 2013 as a peer-to-peer crowdfunding platform designed for higher education settings. It has evolved to a digital fundraising platform for education institutions and other nonprofits.

The company works with small fundraising shops and student groups at universities to help them harness the power of crowdfunding, set campaign goals, highlight their stories, and raise support for meaningful causes.

7135 E Camelback Rd Suite #360

Scottsdale, AZ 85251

https://useed.net/

Key Product Facts

Useed provides a unified digital fundraising platform to launch campaigns. Its features include:

- A giving day platform with dynamic, mobile-ready campaign pages, secure payment integrations, and gift reconciliation reporting;
- A digital storytelling platform to share campaigns and causes of interest with campus communities;
- Tools to spur competitive fundraising with matchups, the ability to put multiple causes on a single page, and real-time flexible scoring dashboards visible to the community to create urgency and increase giving.

Higher Education Clients

Useed reports that its client base in the higher education sector includes: University of Washington, Rochester Institute of Technology, Princeton University, Pacific Lutheran University, Augustana College, Knox College, Simon Fraser University, and University of Alberta.

Source: https://useed.net/

Marketing Automation

Primary Providers

Constant Contact. 39
Emma. 40
HubSpot. 41
Marketo 42
Salesforce Marketing Cloud. 43

Criteria for Inclusion

Comprehensive online marketing automation platforms offer features such as mass personalization (e.g. email and web journeys) as well as social media management tools. Marketing workflow automations improve integration and efficiency of workflows for communications staff and provide consistent, high-quality, and personalized digital experiences for constituents.

Marketing Automation

Other products provide capabilities and functions for marketing automation as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

Blackbaud CRM. 14
Cerkl. 49
e2s Connect. 16
Ellucian CRM Advance 15
Fundmetric 73
Gravyty 74
iModules 32
Jenzabar Advancement 17
PeopleSoft Contributor Relations 18
QuadWrangle 53
Raiser's Edge NXT 19
Salesforce for Advancement 20
Slate 21
Talisma Fundraising 22

Constant Contact

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (primary)	Marketing Automation
✔ (secondary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Constant Contact, founded in 1995, has grown from an early email marketing pioneer to a publicly traded company after being acquired by Endurance International Group in 2016.

Its solutions help manage email marketing for large and small businesses, as well as nonprofits and higher education institutions.

Reservoir Place, 1601 Trapelo Road
Waltham, MA 02451
(855) 783-2308
https://www.constantcontact.com

Key Product Facts

The Constant Contact email marketing suite handles email marketing processes, but also provides functionality beyond email marketing in the form social media management and other useful features for university advancement organizations. Its key features include:

- An email template editor that gives marketers the capability to customize email templates;
- Email marketing automation tools to set up a series of emails for contact lists, including automatic emails for birthdays, anniversaries, or other milestones;
- List segmentation tools to segment email recipients into targeted lists based on the content they engage with in each email;
- List management tools to automatically handle tasks such as unsubscribes, bounces, and flagging inactive email addresses;
- Real-time tracking tools provide insight into who is opening, clicking, and sharing email content and social media posts, which can help optimize marketing strategy;
- Other features include surveys, as well as simple online giving and event management functionality.

Higher Education Clients

EAB was unable to identify higher education institutions using Constant Contact software.

Source: https://www.constantcontact.com

Emma

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (primary)	Marketing Automation
✔ (secondary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Campaign Monitor, the email marketing company which acquired Emma in 2018, was founded in 2004 in Nashville, Tennessee. The company now offers the Emma email marketing solution as one of its three flagship products.

Emma is used by a range of businesses including marketing agencies, restaurants, retail, nonprofits, as well as colleges and universities. Higher education institutions can leverage its email marketing solution for athletics, student life, alumni relations, and advancement, allowing staff to manage and coordinate email marketing efforts from a university-wide and/or organizational level.

9 Lea Ave.

Nashville, TN 37210

(800) 595-4401

https://myemma.com/

Key Product Facts

Emma’s email marketing suite offers a full range of tools for email marketers across the university, including:

- A centralized hub for maintaining creative assets such as brand logos, colors, and designs for consistent use;
- Mobile-first, visually appealing email templates, which are designed to boost effectiveness indicators such as open rates;
- Tools to create, organize, and schedule timely and personalized communications — automatically based on constituent activity — that nurture important relationships in a scalable way;
- A list segmentation tool that uses data such as graduation date, donation history, or other factors, which provides the capability to automatically send dynamic and personalized content to distinct groups in a single mailing;
- A dashboard that allows users to compare email campaign performance across the entire university or drill down to specific organizations or departments.

Higher Education Clients

Emma reports that it serves more than 800 universities worldwide, including: Yale, Massachusetts Institute of Technology, Tufts University, University of Notre Dame, University of Virginia, Villanova University, Purdue University, and Vanderbilt University.

Source: https://myemma.com/

HubSpot

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (primary)	Marketing Automation
✔ (secondary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

HubSpot was founded in 2004 and made an initial public offering in 2014 to become a publicly-traded company. It is used by marketers as an integrated platform to generate interest in companies with an array of digital tools including web pages, digital ads, blogs, social media management, and email marketing.

Its Marketing Hub software suite can be used by advancement teams responsible for email marketing and social media management.

Cambridge St

Cambridge, MA 02141

(888) 482-7768

https://www.hubspot.com/

Key Product Facts

HubSpot's Marketing Hub software suite serves as an integrated platform for marketing teams to execute email, digital advertising, and social media campaigns. The product's primary features include:

- Email templates with personalized, dynamic subject lines and content are provided, as well as A/B testing capabilities for optimizing email outreach effectiveness;
- Web and email journeying pathing tools which can created tailored journeys based on constituent interactions with email content;
- A social media management module which allows posts, mentions, and relevant conversations to be scheduled and tracked automatically;
- Bi-directional Salesforce integration gives the ability for records of all constituent activity to be mapped to the Salesforce database for list segmentation and lead scoring;
- Ad tracking shows marketers how effective their paid ad spending, including AdWords, and Facebook ads, is in drawing traffic to their web content.

Higher Education Clients

EAB was unable to identify higher education institutions using HubSpot software.

Source: https://myemma.com/

Marketo

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (primary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Marketo was founded in 2006 as a business-to-business marketing automation company. It was acquired by Adobe in September 2018.

The company provides a marketing automation platform to enterprises across industries. The platform handles email, mobile, web, social, and digital ads as well as marketing and sales insight generation.

Within colleges and universities, Marketo is primarily used for admissions, student success, and alumni engagement. It aims to deliver timely and personalized engagement touches across the entire student lifecycle. Marketo solutions can be integrated with leading business software such as Salesforce and others.

901 Mariners Island Boulevard, Suite 500
San Mateo, CA 94404
(877) 260-6586
https://www.marketo.com/solutions/higher-education/

Key Product Facts

Marketo offers its marketing automation services to higher education institutions in a variety of bundles designed to meet specific needs, including email marketing, lead management, consumer marketing, mobile marketing, and customer base marketing. Bundles come pre-packaged with certain features and capabilities but can also be customized. Features included in each of the bundles include:

- Features that allow for integrated marketing campaigns using email, web, digital ads, and social, all with optimization through lead scoring, segmentation, and dashboard reporting;
- Email and landing page template creators, A/B testing, automated workflows, and calendars, search engine optimization, social marketing and others;
- A customer database with segmentation, scoring, and nurturing capabilities, as well as email marketing features like landing pages, forms, social media management, and analytical tools such as reporting dashboards.

Higher Education Clients

Marketo mainly works with large private sector clients. The company reports that its portfolio of higher education clients include: Stanford University, Rutgers University Foundation, University of Nevada Reno, St. Edward’s University, Lewis University, and Algonquin College.

Source: https://www.marketo.com/solutions/higher-education/

Salesforce Marketing Cloud

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (primary)	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Salesforce was founded in 1999 and offers a cloud-based CRM as its flagship product. It is now a Fortune 500 company and market leader in cloud-based business software covering commerce, marketing, analytics, customer support, case management, and other business processes.

The Salesforce Marketing Cloud platform is used by advancement communications departments, as well as their university- and college-level marketing counterparts, to form the foundation of their digital outreach efforts.

415 Mission Street, 3rd Floor
San Francisco, CA 94105
(647) 258-3800
https://www.salesforce.org/highered/advancement-software/

Key Product Facts

The Salesforce Marketing Cloud is a unified platform for all digital marketing tools — from email outreach to online advertising to text messaging. Its component features include:

- An email marketing platform to target audiences, build engaging emails, and automate outreach;
- Journey builder tools to create one-to-one digital journeys for constituents across all departments and marketing channels;
- Social media management tools to provide a platform for social media listening, publishing, and active engagement with constituents across popular channels;
- An SMS text messaging platform, with automated text response, information capture, and multimedia messages;
- A digital advertising tool that aligns advertising and marketing activities to existing CRM data, excludes existing constituents from advertising campaigns on Google and Facebook, and engages new constituents with similar online behavior patterns.

Reported Results and Case Profiles

- Salesforce reports that Marian University realized a 58% jump in on-time tuition payment in one year.
- According to Salesforce, Arizona State University streamlined communications by migrating 13 email marketing systems into one.

Higher Education Clients

Salesforce currently works with higher education institutions such as Arizona State University, Southern New Hampshire University, Boston College, and Marian University.

Source: https://www.salesforce.org/highered/advancement-software/

Multichannel Communications

Primary Providers

Cadence 47
Campus Sonar. 48
Cerkl 49
EAB Advancement Marketing Services 50
Hootsuite. 51
Hustle 52
QuadWrangle 53
Relay 54
RNL Complete Fundraising. 55
SocialToaster 56
ThankView 57

Criteria for Inclusion

Specialized technology solutions enabling communications campaigns that go beyond crowded email marketing channels are becoming widely used in university advancement. From innovative social media campaigns to text messaging, these solutions target one or more communications channels to boost institutions' mindshare in an increasingly crowded digital landscape.

Multichannel Communications

Other products provide capabilities and functions for multichannel communications as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

Blackbaud CRM. 14
Constant Contact. 39
e2s Connect. 16
Ellucian CRM Advance 17
Emma 40
EverTrue 63
Fundly 27
GG+A Philanthropic Analytics. 64
HubSpot 41
iModules 32
Jenzabar Advancement. 17
Marketo. 42
MobileCause 33
NetCommunity. 85
PeopleGrove. 86
PeopleSoft Contributor Relations 18
Raiser's Edge NXT 19
Salesforce for Advancement 20
Salesforce Marketing Cloud 43
Scalefunder 34
Slate 21
Talisma Fundraising 22

Cadence

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Mongoose, founded in 2009, is a publishing and technology company solely focused on helping colleges and universities connect with their constituents.

Their cloud-based software, Cadence, allows users to send personalized text messages to current and prospective students and alumni.

6506 East Quaker Street, Suite 202

Orchard Park, NY

(716) 616-3348

https://www.mongooseresearch.com/cadence

Key Product Facts

The Cadence text messaging platform enables communication with students with the objective of improving enrollment yields and student outcomes. The tool is also used to increase awareness, engagement, and fundraising results through alumni-facing text message outreach. The platform's features include:

- The ability to assign a unique phone number for individual accounts or teams;
- A group account feature where a single phone number is assigned;
- Integration with multiple databases and information systems, with two-way integration allowing for text interactions to be easily stored on constituent records.

Higher Education Clients

Cadence is used by 400+ colleges and universities, including: Rochester Institute of Technology, Oklahoma Christian University, University of Maine at Farmington, Nazareth College, and Carroll University.

Source: https://www.mongooseresearch.com/cadence

Campus Sonar

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔ (Primary)	Multichannel Communications
✔ (Secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Campus Sonar launched in October 2017 as a subsidiary of the nonprofit corporation Ascendium Education Group (formerly Great Lakes Higher Education Corporation). Its latest business venture into social listening technology and services aims to connect social listening data to strategic insights for marketing, enrollment, or advancement efforts.

Among other services, advancement organizations make use of the company's audience intelligence analysis, which can help answer crucial questions about alumni population segments and provide evidence for changing programming in response to demonstrated affinities.

2501 International Lane

Madison, WI 53704

(608) 246-1800

https://www.campussonar.com/

Key Product Facts

Campus Sonar offers a social listening technology platform and through a partner network of experienced consultants. It offers a suite of customized services that provide much needed social media insight for the whole higher education institution. Its key product capabilities include:

- Issue monitoring tools to help manage strategic issues that occur on campus, including crises;
- Reporting dashboards covering conversation trends provide insight into online conversations and influencers, as well as specific constituent segments;
- Audits for improving online reputation management and social media strategy;
- Competitive analysis as a service is also performed by Campus Sonar, which measures how an institution's social media presence stacks up to that of its peers.

Price

Audience Intelligence Pricing is between $5,000–$50,000 annually.

Higher Education Clients

Campus Sonar reports working with five higher education clients, including: Loyola Marymount University, Spring Hill College, and Beloit College.

Source: https://www.campussonar.com/

Cerkl

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (primary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Cerkl was founded in 2012 to provide tools that use artificial intelligence to personalize digital interactions in order to increase audience engagement. The platform curates content specifically for the individual constituent based on their preferences and past interactions.

Cerkl is used for audience engagement, employee engagement, higher education engagement, and for other marketing solutions. It integrates with most popular technology platforms in higher education, such as Advance, Raiser's Edge, Salesforce, and iModules.

4424 Carver Woods Dr #103
Blue Ash, OH 45242
(888) 550-8777
https://cerkl.com/

Key Product Facts

Cerkl's platform uses artificial intelligence (AI) to automatically personalize communications across email, web, and mobile channels. Its AI-enabled learning engine can be integrated anywhere there is digital content and can automatically create an archive of news, events, and videos customized to different audiences. Its automatic content generation can personalize content such as newsletters and websites. Its product features include:

- A content management system that allows users to organize and search all website, internally-hosted, and video content;
- Engagement scoring tools give staff a view of the interests and engagement levels of constituents such as accepted students;
- Tools to create customized emails and interest-based solicitations for students and parents with curated content;
- Customizable dashboards for interpreting and sharing Cerkl engagement metrics.

Price

Cerkl pricing starts at $5,000/year.

Higher Education Clients

Cerkl reports that it works with higher educations including: Duke University, Miami University, University of Dayton, University of Massachusetts Boston, Western Carolina University, Susquehanna University, Augsburg University, and Florida Gulf Coast University.

Source: https://cerkl.com/

EAB Advancement Marketing Services

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (primary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Advancement Marketing Services equips advancement offices with best practice research and enhanced infrastructure to help them reach their fundraising goals. By combining tried and proven direct marketing strategies with a data-driven, multichannel approach, we are able to increase overall donor revenue and alumni participation.

Our firm has a 40-year tradition of delivering exceptional service, insight, and results. Every day, we harness the collective power of our 1,700+ partner institutions to uncover proven solutions and transformative insights.

1920 E. Parham Road

Richmond, VA 23228

(804) 741-8961

https://www.eab.com/services/advancement

Key Product Facts

EAB's Advancement Marketing Services helps advancement leaders reach their fundraising goals via effective multi-channel fundraising across both modern and traditional channels. Our offerings include:

- Data modeling and strategy creation that pairs demographic, biographical, and transactional data with next-step campaign and program-planning recommendations;
- Campaign delivery and development, including donor journey building, art and graphic design, strategic digital marketing ad buy and placements, and mobile optimization;
- In-market A/B campaign testing, performance analysis facilitating in-market changes, email deployment monitoring and deliverability tracking, and an ongoing reporting suite;
- Access to dedicated consultants and experts in advancement and fundraising with semi-annual in-person progress updates.

Higher Education Clients

EAB works with advancement divisions at higher education institutions such as: the University of Virginia, Providence College, Marist College, North Carolina A&T, Miami University of Ohio, the University of Memphis, and Yeshiva University.

Source: https://www.eab.com/services/advancement

Hootsuite

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Hootsuite was founded in 2008 and now works with more than 800 out of the Fortune 1000 companies. The company's social media management software is used by top brands to manage reputations and social media marketing processes.

Higher education institutions use Hootsuite's solutions to unify their social media presence across channels and departmental organizations — from admissions and student services to alumni relations.

5 E 8th Ave

Vancouver, BC V5T 1R6

(888) 350-5191

https://hootsuite.com/

Key Product Facts

Hootsuite's social media management platforms help university staff present a unified voice to constituents, track social conversations, and safeguard their public reputations. The products' key capabilities include:

- Post scheduling to allow staff to upload, edit, and schedule posts in bulk, even from their mobile devices;
- Content curation tools to give staff a library of pre-approved content to share, with built-in searching, tagging, and usage tracking;
- Social media monitoring tools with the capability to set up custom monitoring streams organized by tabs according to keywords or locations,
- Workflow management tools to coordinate responses by assigning them to appropriate team members;
- Social media marketing analytics and reporting to allow users to gain insight into performance in popular channels with customized dashboards or off-the-shelf report templates.

Higher Education Clients

In addition to working with large private companies, Hootsuite also works with higher education institutions such as: University of Miami, Georgia State University, University of New Hampshire, University of New South Wales Sydney, and University of British Columbia.

Source: https://www.socialtoaster.com/

Hustle

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔ (primary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Hustle was founded in late 2014 to leverage the power of one-to-one text messaging for building meaningful relationships with constituents. The platform allows advancement staff to send personalized text message communications to large groups of constituents, enabling two-way communication in an engaging manner.

Hustle started by primarily serving the political and non-profit markets but has now extended to focus on driving alumni donations to universities, sales for enterprises, and attendance for event promoters.

343 Sansome St, #600

San Francisco, CA 94104

(415) 851-4878

https://www.hustle.com/

Key Product Facts

Hustle clients have used the platform to improve enrollment yield, provide personalized resources to improve student outcomes, encourage event attendance, and reach more alumni during annual giving campaigns. The core features of the platform include:

- Goal setting tools for each campaign, using metrics such as event attendance or fundraising;
- Use an easy-to-use interface to track message impact performance;
- Tools to segment audiences and send personalized text messages in bulk with user defined custom fields, so each recipient has a message tailored to them;
- The ability to add links directly into text messages, allowing recipients to give straight from their phones;
- Text 1000+ people in an hour with messages appearing to be coming from a number in the university's area code;
- Hustle can be connected with popular CRM systems, such as Salesforce, so contacts can be divided between team members.

Higher Education Clients

Hustle has long served nonprofits and political organizations. The company reports its higher education clients now include New York University, Amherst College, University of Kansas, Stanford University, Spelman College, and Northwestern University.

Source: https://www.hustle.com/

QuadWrangle

Product Capabilities/Functions	
	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (primary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

QuadWrangle began working with higher education institutions in 2011 and was later acquired by Ruffalo Noel Levitz in 2019. Its artificial intelligence-powered engagement platform, called Issac, uses IBM Watson technology to automatically personalize engagement, saving fundraisers valuable time when creating personalized outreach messages to constituents.

The platform primarily aims to make alumni engagement and fundraising easier for advancement staff working in development and alumni relations departments.

2 Avenue de Lafayette, Floor 4

Boston, MA 02111

(202) 390-2973

https://www.quadwrangle.com/

Key Product Facts

QuadWrangle's platform capabilities include email automation and mobile apps for community building. The features of these products are geared toward both saving time for staff and increasing the relevance of outreach efforts through the power of data science and automation. Its features and capabilities include:

- Automatically drafting highly personalized emails that use a range of constituent data such as profile information, interests, and location, to create email communications like newsletters, digests, and other communications content;
- An interface with drag-and-drop design, photo editing, campaign programming, and real-time reporting;
- Event management tools, which include automated ticketing and promotion functions within a constituent-facing mobile application;
- Event data collection tools that provide insight on attendance and revenues as well as the interests of nearby alumni, which can be extracted with a map tool that automatically produces reports with data for all alumni within a geographic area.

Higher Education Clients

Quadrangle reports that its higher education clients include: University of Massachusetts Boston, Georgia Institute of Technology, St. John's University, Cornell College, Minnesota State, and Calvin College.

Source: https://www.quadwrangle.com/

Relay

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*
✔ *Secondary Capabilities/Functions*

Vendor in Brief

Relay launched in August 2016 to help clients harness the power of peer-to-peer texting. Its core value proposition is to unlock the high-touch power of texting to move people from interest to action. It allows advancement organizations to send personalized text message communications to constituents for both engagement and solicitation purposes.

Relay has been used to support political campaigns and nonprofits, in addition to colleges, universities, and independent schools of varying sizes.

1330 Broadway, 3rd Floor
Oakland, CA 94612
https://relaytxt.com

Key Product Facts

Relay's clients have used the platform for giving days/challenges, donor follow-up, event recruitment, parent giving, soliciting senior class gifts, as well as engaging and acquiring first time volunteers. The core features of the platform include:

- Text messaging tools for personalized messaging in bulk with user defined custom fields, so each recipient receives a tailored text message, enabling genuine two-way conversations with recipients;
- Features such as free cell phone number validation, localized sender phone numbers, training, and unlimited technical and strategic support;
- Unique links can be inserted into Relay messages, allowing the institution to track which gifts and RSVPs came in directly via text.

Price

Pricing plans include a monthly plan option ($.25 per active contact/month) and an annual plan option ($1.50 per active contact/year). There is a one-time setup fee of $250. Bulk discounts are available depending on how many messages are sent per month.

Reported Results and Case Profiles

According to Relay, platform users had an average LYBUNTS response rate of 25-30%, and average Giving Day response rate to 10-15%, and an average alumni engagement (non-fundraising asks) response rate of 40-50%.

Higher Education Clients

Relay identified Vassar College one of its higher education sector clients.

Source: https://relaytxt.com

RNL Complete Fundraising

Product Capabilities/Functions	
	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
✔ (primary)	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Ruffalo Noel Levitz (RNL) was formed in 2014, when higher education services providers RuffaloCODY and Noel Levitz merged. The company works across enrollment management, student success and fundraising management, providing consulting, services and technology products to colleges, universities and nonprofit institutions alike.

RNL Complete Fundraising provides higher education advancement organizations with solutions for a variety of fundraising objectives, including major and planned giving, digital giving, annual giving, and advancement services.

1025 Kirkwood Parkway SW
Cedar Rapids, IA 52404
(800) 876-1117
https://www.ruffalonl.com/higher-education-fundraising-management

Key Product Facts

RNL offers a number of research and technology solutions to higher education advancement teams through its RNL Complete Fundraising service, they include:

- Advanced analytics, predictive modeling, and multichannel donor warming to produce highly qualified donor pools;
- Tools to qualify, warm, and automatically schedule meetings within a prospect pool;
- Marketing automation and social media outreach tools;
- Phonathon and direct response solutions;
- An online giving platform that includes the capability to launch giving day sites, coordinate volunteers, set and track campaign goals, and reach out to constituents through email and social media;
- A crowdfunding platform which allows users to create and share giving opportunities in a customizable platform that also allows donors to see the impact of their gifts with fulfillment and project updates;
- A service to enhance constituent databases with phone, address, employer, and email data enrichment as well as prospect research tactics such as survey calls and demographic update outreach.

Higher Education Clients

More than 1,900 campuses and nonprofits work with RNL each year in enrollment management, student success, or fundraising.

Source: https://www.ruffalonl.com/higher-education-fundraising-management

SocialToaster

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔ (primary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

SocialToaster launched in 2009 and has grown to become an enterprise-level constituent engagement platform that uses social media to engage audiences and amplify messages.

SocialToaster makes use of customizable marketing emails, social media campaigns, contests, and social gamification to engage constituents by turning them into active advocates and ambassadors. The system encourages constituents to share content to increase an organization's reach.

In addition to social media engagement, SocialToaster also offers media buying and enhanced audience-targeting capabilities to help organizations grow their brand following.

300 Clipper Mill Road, Suite 240
Baltimore, MD 21211
(855) 628-6278
https://www.socialtoaster.com/

Key Product Facts

Leveraging the concept of influencer marketing, SocialToaster give its users the ability to push content to engaged constituents, who are incentivized to share that content with their social networks, amplifying its reach in the process. The platform is commonly used to increase giving day donations, support ongoing fundraising initiatives, develop and nurture alumni relationships, and grow new student enrollment. Core features of the platform include:

- Compatibility with all major social networks, such as Facebook, Twitter, LinkedIn, and Instagram;
- Integration with popular marketing tools, such as Salesforce and Google Analytics;
- Tools to reach and engage students, faculty, and alumni through an advocacy marketing program;

Higher Education Clients

SocialToaster has more than 85 higher education clients, including the University of Michigan, Massachusetts Institute of Technology, New York University, Columbia University, Purdue University, University of Maryland, Dartmouth College, and Boston College.

Source: https://www.socialtoaster.com/

ThankView

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

ThankView was founded in 2015 as a platform for recording and sending video thank you cards. It is used by newlyweds, new parents, or anyone who is looking to send a personalized thank you note.

Advancement staff in colleges and universities have begun to recognize the value of this tool for delivering impactful and personalized stewardship touches to donors quickly and efficiently. It is also used by some higher education institutions for enrollment and recruiting purposes.

New York, NY

https://thankview.com/

Key Product Facts

ThankView's platform allows users to customize videos with institutional branding, animations, photos, music. Users may then send videos to constituents and track their response performance metrics. Its main features include:

- Video requests that allow users to request videos from colleagues directly through the platform;
- Merge fields to allow for mass email personalization;
- Automated message scheduling to send out communications at specified dates and times, through email or text message;
- A real-time dashboard to track metrics like open rates;
- Integrations with popular CRM software from Blackbaud, Ellucian, Salesforce, and others.

Higher Education Clients

ThankView reports that its platform is used in colleges and universities such as: Georgetown University, Pepperdine University, Fordham University, Boston University, Miami University, University of California Davis, Ohio State University, and Oklahoma State University.

Source: https://thankview.com/

Prospect Data Analytics

Primary Providers

ADVIZOR Solutions 61
Argos. 62
EverTrue 63
GG+A Philanthropic Analytics 64
HelioCampus 65
Reeher 66
SAS. 67
Target Analytics 68
Veera 68

Criteria for Inclusion

Data reporting and visualization tools have become a mainstay in advancement offices where constituent data is often hidden from general view in legacy and/or dispersed data management solutions. These tools integrate with internal and external data sources, allowing users to extract insights from a broader set of constituent data to plan fundraising strategy.

Prospect Data Analytics

Other products provide capabilities and functions for prospect data analytics as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

Blackbaud CRM. 14

Campus Sonar. 48

DonorSearch. 77

EAB Advancement Marketing Services 50

Ellucian CRM Advance 15

Fundly 27

Fundmetric 73

GoFundMe Charity 30

Graduway. 84

Gravyty 74

iModules. 32

iWave. 78

Jenzabar Advancement 17

Marketo. 42

PeopleSoft Contributor Relations 18

QuadWrangle 53

Raiser's Edge NXT 19

RNL Complete Fundraising 55

Salesforce for Advancement 20

Salesforce Marketing Cloud 43

Slate 21

Talisma Fundraising 22

WealthEngine 79

ADVIZOR Solutions

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (primary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

ADVIZOR Solutions was formed in 2003 after being spun out of some research at Bell Labs. It deploys a customized needs assessment and on-site implementation that aims to remove the need for IT staff and outside consultants to regularly prepare data and reports for leadership.

The company primarily works with organizations that have made investments in traditional business intelligence and data warehouse infrastructure. It provides an overlay that serves as a full front-end interface for users to explore data interactively to answer questions.

ADVIZOR also has a partnership with Ellucian to provide a service: the Ellucian Data Visualization by ADVIZOR.

1333 Butterfield Rd

Downers Grove, IL 60515

(630) 971-5250

https://www.advizorsolutions.com/solutions/fundraising/

Key Product Facts

ADVIZOR Solutions can be used across advancement offices from prospect research, alumni relations, annual giving to senior managers or gift officers in the field. User groups can use this tool to analyze data to inform strategy at an individual or organizational level. Common ways to view constituent data include:

- Dashboards to view shop performance across schools, departments, and affinity groups, with drill down capability into their performance for senior managers to identify missed opportunities;
- Tools to analyze activities like contacts and proposals to determine cultivation timeframes, close rates, prospect coverage, and balance of attention paid to constituency segments;
- User-friendly list generation capabilities, with the ability for users to collaborate and change parameters in real-time as they see the data;
- A mobile-ready application that gives gift officers self-serve access to the information they need to determine the how to optimize their time spent fundraising.

Higher Education Clients

ADVIZOR Solutions works with a variety of higher education advancement offices, including: University of Georgia, Emory University, Wake Forest University, Purdue University, Georgia Institute of Technology, University of Florida Foundation, and Dartmouth College.

Source: https://www.advizorsolutions.com/solutions/fundraising

Argos

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Evisions was formed in 1998 to build software that helps ease the administrative load of higher education administrators.

Its product offerings include solutions for enterprise data reporting (Argos), payment processing (IntelleCheck), IPEDS surveys (IRIS), and document enhancement (FormFusion).

The company also offers training, custom software development and training services. The enterprise reporting tool, which can pull data from a number of databases across campus, serves as a portal which users can view their constituent data holistically.

440 Exchange, Suite 200

Irvine, CA 92602

(888) 533-5993

https://evisions.com/

Key Product Facts

The Argos enterprise data reporting solution serves as a complete reporting tool for an unlimited number of users. It provides a user-friendly interface to make complicated queries of all SQL compliant databases. Its key features include:

- Professionally-formatted report templates with institution logos etc. to give a consistent look and feel to outputted reports in a variety of file formats;
- A data dictionary which gives easy-to-understand field descriptions to match names and definitions for many leading ERP systems;
- Automatic report creation and distribution tools give users the ability to schedule reports to be pulled and sent by email or FTP to specific individuals on a regular basis;
- Argos API allows reports to be run and delivered through third party cloud software or ERP systems;
- Dynamic real-time dashboards to summarize data simply and graphically with interactivity features that allow users to drill down into data for more detailed analysis;

Higher Education Clients

The Argos enterprise data reporting solution is used across campus units that need to analyze constituent data. Their higher education clients include: University of Alabama, University of Idaho, University of Wyoming, Missouri State University, Lehigh University, and LaSalle University.

Source: https://evisions.com/

EverTrue

	Product Capabilities/Functions
	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (primary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

EverTrue was founded in 2010 during its founder's time at Harvard Business School. The company's platform aims to harness the power of data from social media and other data sources to provide a more complete picture of prospects in donor databases. It also illuminates high-potential prospects with advanced analysis and reporting, which allows advancement staff across the organization prioritize their efforts and make data-driven decisions on fundraising strategy.

The solutions EverTrue offers are tailored to serve staff working in prospect research, alumni relations, annual giving, and major gifts to enhance their knowledge of constituent affinities, capacities, and therefore, the effectiveness of fundraising appeals.

330 Congress Street, 2nd Floor

Boston, MA 02210

1-855-(387-8783

https://www.evertrue.com/

Key Product Facts

The EverTrue technology product line can be integrated with most major enterprise software providers serving advancement organizations, such as Blackbaud, Salesforce, Ellucian, Jenzabar, and others. Its features support a variety of advancement functions, including:

- Relationship management solutions to bring prospect data into a single platform, allowing frontline fundraisers to build and manage their portfolios, quickly plan trips, log reports on the go, and view performance analytics for individuals and teams;
- Search tools which can query an array of data on prospect wealth and affinity in the platform, which is enhanced through its partnerships with LinkedIn, Zillow, Facebook, and other data sources, allowing them to identify new potential donors according to wealth and affinities;
- A branded, secure institutional alumni directory—open to all alumni, with up-to-date professional data from LinkedIn for networking;
- Tools to analyze user engagement data generated by alumni interaction with the alumni directory , which helps identify volunteers, mentors, and supports outreach efforts to them;
- Customized giving pages, which can be segmented and tied to targeted appeals based on constituent affinities, with real-time performance monitoring dashboards.

Reported Results and Case Profiles

- According to EverTrue, Trinity University added 400 new prospects to gift officer portfolios shortly after implementing their platform.

Higher Education Clients

More than 300 leading advancement organizations, including higher education institutions like: Cornell University, Boston University, Oregon State University, Oklahoma State University, University at Buffalo, Weber State University, and Trinity University.

Source: https://www.evertrue.com/

GG+A Philanthropic Analytics

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔ (secondary)	Multichannel Communications
✔ (primary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
✔ (secondary)	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Grenzebach, Glier and Associates (GG+A) was established in 1961 to provide philanthropic consulting services. It now works with nonprofit organizations such as independent schools, arts, culture, and civic organizations. It also works with the higher education and academic medicine sectors.

In addition to the full-service philanthropic consulting and services it has long offered, the company also provides analytics capabilities to advancement leaders in higher education to enhance productivity in annual giving, major gift fundraising, alumni relations, and strategic communications.

200 South Michigan Avenue, Suite 2100
Chicago, IL 60604
(312) 372-4040
https://www.grenzebachglier.com/

Key Product Facts

GG+A Philanthropic Analytics services, which draw upon the industry experience and technical expertise of fundraising consultants, fall into the following categories:

- Benchmarking services to help identify a cohort of peers, at the unit or university level, based on a variety of important factors, and later analyze the data to highlight areas of improvement;
- Surveys to understand attitudes and opinions, stewardship satisfaction, potential messaging, and other topics;
- Consultative analytics services such as data security consulting, predictive modeling of donor affinity, prospect management and portfolio analysis, and prospect pool valuation, all powered by custom-created data visualization and performance dashboards;
- A wealth screening service that can target alumni, parents, and friends of the institution, accounting for unique participation factors such as event attendance to provide estimations of household philanthropic giving capacity.

Higher Education Clients

GG+A's range of services are used by more than 400 higher education clients globally, including: University of Mississippi, University of Nevada, University of Washington, Boston College, Temple University, Columbia University, Yale University, and Oxford University.

Source: https://www.grenzebachglier.com/

HelioCampus

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (primary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

HelioCampus was created in 2010 by the Office of Analytics at The University of Maryland University College. After years of demonstrated improvements in enrollment, persistence, and cost management aided by the platform, the University System of Maryland Board of Regents decided to spin off its Office of Analytics into a private company in 2016.

The cloud-hosted data visualization platform is used by university staff for enrollment management, student success, finance and administration, as well as advancement, providing a foundation for generating campus-wide predictive analytics initiatives.

7315 Wisconsin Avenue, Suite 750W
Bethesda, MD 20814
(844) 994-3546
https://www.heliocampus.com/

Key Product Facts

The HelioCampus dashboard is an analytics platform that sits as an overlay of other data sources used by advancement offices, such as the constituent database of record and other internal databases. By pulling these data and applying descriptive and diagnostic analyses to make predictions, the tool answers questions and reveals opportunities to accelerate gift giving. Some of the data analyses made possible by the platform include:

- Descriptive analyses such as current pledge totals, year-on-year comparisons, highest-performing funds, identifying biggest and most loyal donors, and analysis of response rates to appeals;
- Diagnostic analyses such as pinpointing shared characteristics of the best donors, identifying the highest performing messaging;
- Predictive analyses such as matching alumni segments to the giving opportunities they are most likely to respond to, forecasting how many donors are expected to give in future years, and the optimal gift size ask based on historical giving patterns.

Higher Education Clients

The HelioCampus data analytics platform is used across campus units that need to analyze constituent data. Their higher education clients include: University of Massachusetts Amherst, University of Southern Mississippi, Clark University, Ithaca College, and St. Edward's University.

Source: https://www.heliocampus.com/

Reeher

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (primary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
✔ (secondary)	Event Management
✔ (secondary)	Wealth Screening
✔ (secondary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Reeher, which was originally founded in 2002 and was acquired by Blackbaud in April 2018, provides a fundraising performance analytics platform to nonprofits and higher education.

The Reeher Platform is used in development offices, as well as in advancement services, annual giving, and alumni relations teams, to help identify and prioritize prospects, allowing organizations to raise more money with fewer resources.

The company also offers a talent management platform designed specifically for higher education fundraising teams to incentivize performance, retain top performers and nurture career development.

370 Wabasha Street North, Suite 1200
St. Paul, MN 55102
(651) 313-6000
https://www.reeher.com/

Key Product Facts

The Reeher Platform is comprised of a collection of web-based and mobile tools that leverage fundraising performance data from Reeher Community institutions and the predictive models informed by that data. Reeher provides strategic planning advice to leaders through a customer success team that is dedicated to each client. The platform allows advancement shops to take advantage of a range of features, including:

- Automated prospect identification tools with algorithm-driven forecasting using models built specifically for individual institutions;
- Role-based workflow paths for fundraisers to improve their efficiency by keeping them engaged and accountable;
- Self-service reporting tools to provide current data on campaigns, donors and processes;
- Custom predictive modeling capabilities to identify the most engaged alumni for volunteering, speaking, event programming, and gift solicitations;
- Volunteer fundraising campaign management tools such as project management, communication, and reporting functions tailored to suit volunteer fundraising initiatives.

Higher Education Clients

Reeher reports that it works with advancement teams at Duke University, Temple University, Texas Woman's University, and Calvin College.

Source: https://www.reeher.com/

SAS

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

SAS is an enterprise software company that grew out of a research project at North Carolina State University in 1976. Its products are used in education institutions as well as in 94 out of 100 companies in the Fortune Global 100.

SAS analytics solutions are implemented at more than 3,000 education institutions, including in student enrollment, institutional research, and advancement settings. Administrators in higher education primarily use SAS Enterprise Analytics for Education for purposes such as compliance reporting, strategic planning, accreditation, and creating the foundation for data-driven decision making with an enterprise data warehouse.

100 SAS Campus Drive

Cary, NC 27513

(919) 677-8000

https://www.sas.com/en_us/software/enterprise-analytics-for-education.html

Key Product Facts

SAS Enterprise Analytics for Education aims to provide a fully-functioning business intelligence solution to education institutions. Its offering is comprised of three software components that combine to form an end-to-end analytics capability. The software components include:

- SAS Data Management helps organizations cleanse and integrate large volumes of unstandardized data to prepare it for analysis, visualization, and reporting.
- SAS Visual Analytics allow any staff member to explore institutional data intuitively with descriptive, predictive, and prescriptive analyses;
- SAS Office Analytics give Microsoft Excel users the power of SAS Analytics directly in their Excel spreadsheets, pulling data from sources too large for Excel to process with a query interface, and embedding results directly into Excel spreadsheets, Word documents, or PowerPoint presentations.

Higher Education Clients

SAS is used at University of Missouri, George Mason University, Oklahoma State University, University of Alabama, University of New Hampshire, University of Central Florida, Valencia College, Wayne State University, Lipscomb University, and Western Kentucky University.

Source: https://www.sas.com/en_us/software/enterprise-analytics-for-education.html

Target Analytics

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (primary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
	Event Management
✔ (secondary)	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Target Analytics is a division of Blackbaud. It was acquired in 2007 as part of a Blackbaud effort to expand its services to encompass a wider range of nonprofit technology needs.

After numerous acquisitions of fundraising technology products in recent years, including AcademicWorks, JustGiving, and Reeher, Blackbaud's product line now spans a range of advancement shop operations including online giving, scholarship management, gift processing and others.

Target Analytics works with more than 8,000 organizations globally.

2000 Daniel Island Drive
Charleston, SC 29492
(800) 443-9441
https://www.blackbaud.com/solutions/analytics/

Key Product Facts

Blackbaud's Target Analytics (TA) service is a comprehensive analytics solution built for data management, donor acquisition and cultivation, and prospect research. The solution provides advancement teams with features including:

- Enterprise data quality enrichment services with dedicated tools to update constituent addresses, emails, social media profiles, and other information;
- An easy-to-navigate platform that brings together constituent data on wealth, assets, and philanthropic giving to produce likelihood scores;
- A tool to segment constituents into identified giving programs and recommends next-ask amounts;
- Identify target indicators to help fundraisers choose the optimal channels to reach varying segments of donors;
- List generation tools to identify prospects based on unique campaign needs;
- An online advertising solution for delivering targeted messages to your best prospects by matching prospects to a large online cookie pool of individuals.
- Web-based dashboards that serve as a visual interface to analyze fundraising performance and giving behavior.

Higher Education Clients

Blackbaud reports that Target Analytics is used at higher education advancement organizations such as McMaster University, University of South Dakota Foundation, University of Central Missouri Alumni Foundation, and Notre Dame de Namur University.

Source: https://www.blackbaud.com/solutions/analytics/

Veera

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (primary)	Prospect Data Analytics
✔ (secondary)	Fundraiser Workflow Management
	Event Management
✔ (secondary)	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Rapid Insights Inc. was formed in 2002 with the goal of giving people of all skill levels the ability to perform advanced data analysis and build predictive models. Its flagship product is Veera, an analytics platform for data preparation, predictive modeling, and end-user data exploration in areas such as enrollment management, student success, and fundraising.

Veera can be used to support fundraising by unlocking fundraising insights from inaccessible data. Advancement teams can unite disparate data sources to produce a more complete picture of their donor bases — including their propensity to give. The tool is built to be used by teams across advancement, including annual giving, major gifts, and planned giving.

53 Technology Lane, Suite 112,
Conway, NH 03818
(888) 585-6511
https://www.rapidinsightinc.com/solutions/fundraising/

Key Product Facts

The core value proposition of Veera for higher education advancement teams is in allowing staff to make sense of donor behavior by tying together internal data sources with external ones such as wealth screenings, property values, U.S. Census data, social media profiles, and others. The Veera platform is comprised of a few core data analysis tools and features, including:

- A central platform to connect disparate data sources together in a drag-and-drop interface that enables data preparation tasks such as filtering, deduping, and aggregating data;
- Tools to analyze large data sets, measure the strength of relationships between variables, and build a customized model to address a desired outcome or question at hand;
- Real-time dashboards to visualize and translate data using a platform that connects analysts and researchers to the broader team;
- A cloud-based data exploration tool that gives users of any skill level self-service data reporting to drill into any interesting aspects of the data in a self-serve fashion.

Higher Education Clients

Veera is used across campus departments by colleges and universities including: University of Cincinnati, Michigan State University, University of Nebraska Lincoln, University of Pittsburgh, University of North Carolina Greensboro, Swarthmore College, and Dickinson College.

Source: https://www.rapidinsightinc.com/solutions/fundraising/

Fundraiser Workflow Management

Primary Providers

Fundmetric 73
Gravyty 74

Criteria for Inclusion

Technology solutions focusing on features to speed up gift officer task completion are included here. Fundraiser Workflow Management tools typically provide capabilities such as self-serve access to information and advanced workflow management tools for frontline fundraisers. These features give fundraisers the ability to independently make more informed decisions on which donors to cultivate and how.

Fundraiser Workflow Management

Other products provide capabilities and functions for fundraiser workflow management as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

ADVIZOR Solutions 61
Blackbaud CRM 14
Ellucian CRM Advance 15
EverTrue 63
QuadWrangle 53
Raiser's Edge NXT 19
Reeher 66
Salesforce for Advancement 20
Talisma Fundraising 22
Target Analytics 68
Veera 69

Fundmetric

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
✔ (primary)	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Fundmetric is a company that recently began offering its donor engagement software in 2016. Its competency in machine learning has allowed it to build a donor engagement platform that automates a number of time-consuming tasks for fundraisers.

The platform deploys personalized storytelling at scale to small- and mid-sized donors, with the objective of increasing retention rates, gift sizes, and lifetime donor values.

1526 Dresden Row, Suite 502
Halifax, Nova Scotia
(800) 980-2946
https://www.fundmetric.com/

Key Product Facts

The team at Fundmetric has created a platform which is capable of analyzing constituent data, such as their social media presence and giving behavior, and then automatically provides segmented lists of donors to cultivate according to their preferred mode of communication and propensity to give. Fundmetric's Donor Engagement Platform allows fundraisers to segment prospects for personalized communications. Its capabilities include:

- Predictive analytics designed to highlight donors who could lapse, be open to upgrading their giving, or even be receptive to a major gift solicitation, based on their giving behavior;
- Predictive analytics to match donors with the optimal story to resonate with them, based on their interests and giving behavior;
- Analytical tools to determine the best investment of staff resources and time — based on short- and long-term giving estimates of donors — for optimized giving outcomes;
- A communications platform with customizable templates to create and emails, videos, and direct mail;
- Automated scheduling of cultivation touches, solicitations, and stewardship communications to achieve optimal timing.

Higher Education Clients

EAB was unable to confirm which higher education institutions use Fundmetric.

Source: https://www.fundmetric.com/

Gravyty

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
✔ (secondary)	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
✔ (primary)	Fundraiser Workflow Management
	Event Management
	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Gravyty was founded at Babson College as a provider of AI-enabled fundraising software. It recently formed the AI in Advancement Advisory Council (AAAC), which includes prominent thought leaders in fundraising who are shaping the future of advancement technology.

The tool is used by fundraisers to improve their efficiency by optimizing their workflows. It accomplishes this by assisting them with scheduling, writing emails, and alerting them to which donors and prospects would be most receptive to outreach.

Gravyty's software integrates with major fundraising CRM vendors including Blackbaud, Salesforce, Ellucian and others.

124 Vernon Street

Newton, MA 02458

(833) 472-8989

https://www.gravyty.com/

Key Product Facts

The company offers a range of software platforms designed to help fundraisers increase their workflow efficiency by automating tasks such as surfacing prospects and drafting outreach and stewardship messages. The features of the platforms include:

- An automated email drafting tool, which identifies prospects fundraisers should speak to with an algorithm, and drafts a personalized message to that donor informed by machine learning analysis of the individual fundraiser's tone and writing style;
- A scheduling platform that provides a road map for a fundraiser's week — who to call, meet, solicit or steward — with machine learning-generated recommendations for timing and ask amounts;
- Monthly recommendations for travel based on the locations of top donors and prospects;
- Automated stewardship platform that leverages donor data such as most recent gift size compared to prior ones, and other giving factors, to draft update emails taking recent changes into account and notify fundraisers when donors may be ready to upgrade into higher giving tiers.

Higher Education Clients

Gravyty reports that the company serves advancement teams at University at Buffalo, University of Delaware, the College of Charleston, and Yeshiva University.

Source: https://www.gravyty.com/

Wealth Screening

Primary Providers

DonorSearch 77
iWave 78
WealthEngine 79
Wealth-X 80

Criteria for Inclusion

Services for assessing the wealth and giving capacity of constituents provide crucial insights for fundraisers and prospect managers seeking to prioritize prospects for cultivation. These tools are offered as standalone solutions, but more comprehensive technology platforms may also directly update wealth data housed in constituent profiles.

Wealth Screening

Other products provide capabilities and functions for wealth screening as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

GG+A Philanthropic Analytics 64

Reeher 66

Target Analytics 68

Veera 69

DonorSearch

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
✔ (primary)	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

DonorSearch was founded in 2007 to work with nonprofits of all types, including charities, healthcare organizations, religious organizations, and education institutions, to provide actionable prospect research that drives fundraising results.

The company pulls data from 25 databases and reviews key information manually before delivering to clients. It applies proprietary algorithms to its database to identify the best prospects, then delivers them to users through integrations with most common donor management and CRM software.

11245 Dovedale Ct.

Marriottsville, MD 21104

(410) 670-7880

https://www.donorsearch.net/

Key Product Facts

The DonorSearch Wealth Screen platform contains features designed specifically for its nonprofit clients. Features relevant for higher education advancement organizations include:

- A wealth profiling feature allows users to type in a name and generate a comprehensive report of that individual's wealth and philanthropic information;
- A prospect research tool that can highlight new and unknown prospects who may be interested in a certain cause based their past philanthropic activity;
- A planned giving prospect research tool which helps institutions identify planned giving donors, even those who may not have given a major gift before, using modeling and analytics designed for this purpose;
- Tools to perform wealth screening of batches of donors on their own schedule, which also include information from the database on prospect capacity and inclination;
- A customizable web-based tool that allows prospect research teams to uncover the most promising donors and prospects using a variety of features like keyword search, portfolio analytics, mapping, and screening analytics with scoring for a variety gift levels.

Reported Results and Case Profiles

According to DonorSearch's website, its prospect research specialists, combined with machine-generated data, can produce data that is 90% accurate.

Higher Education Clients

EAB was unable to confirm which higher education institutions use DonorSearch software.

Source: https://www.donorsearch.net/

iWave

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
✔ (primary)	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*
✔ *Secondary Capabilities/Functions*

Vendor in Brief

iWave provides user-friendly online prospect research and fundraising tools which take advantage of compiled wealth and charitable giving data from a wide variety of sources, including many specific to Canada. The company has been in business since 1991, exclusively serving healthcare, education, and nonprofit organizations.

Within higher education advancement organizations, the iWave platform is suitable for use by fundraisers or prospect researchers who need to conduct wealth screening for constituent groups.

28 Hillstrom Ave
Charlottetown, Prince Edward Island
(800) 655-7729
https://www.iwave.com/

Key Product Facts

The iWave data suite allows researchers and fundraisers to easily pull data from numerous databases that provide wealth, philanthropic giving, and biographical data. This data is consolidated and analyzed by the platform to provide insight into the capacity of the selected constituent base. The key data processing features found in iWave include:

- Segmentation tools that allow users to segment thousands of individuals into prioritized lists of prospects with both capacity and inclination to give, with transparent results and customizable parameters which can be returned or refreshed in minutes;
- A prospect scoring tool that provides insight into propensity to give, affinity, and capacity, including customized weighting of each of these aspects to ensure alignment with fundraising strategy;
- An automated profile builder that includes customizable data fields, including a prospect score, and an alert feature that notifies users of prospects' wealth-creating events;
- Batch uploading function for quickly inputting new data into donor management or CRM systems;
- A search tool to allow users to search individual prospects across multiple databases simultaneously to get a quick snapshot or verification of data.

Higher Education Clients

iWave reports that its services are used by advancement organizations at University of California Berkley, Stanford University, University of Notre Dame, Duke University, Yale University, Syracuse University, Denison University, Connecticut College, and The New School.

Source: https://www.iwave.com/

WealthEngine

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
✔ (primary)	Wealth Screening
	Alumni Networking/Membership

Primary Capability/Function

Secondary Capabilities/Functions

Vendor in Brief

WealthEngine provides a platform with more than 250 million profiles of people in the United States. The company serves financial services, luxury retail, real estate, higher education, and other sectors needing access to wealth and lifestyle data.

Prospect research teams within university advancement organizations often use WealthEngine to update the philanthropic capacity data of their prospect pools and target prospects using information provided through their database.

WealthEngine products can integrate with Salesforce, Ellucian, Jenzabar, and other popular CRM solutions used in higher education settings.

4340 East West Highway, Suite 900

Bethesda, MD 20814

(301) 215-5980

https://www.wealthengine.com/

Key Product Facts

WealthEngine (WE) products allow for searching, screening, prospecting, and analyzing/modeling constituent data in ways that grant users the ability to personalize outreach with actionable wealth and lifestyle insights. Its solutions' features include:

- A search tool which takes into consideration data points such as propensity to give, capacity, total assets, net worth, cash on hand, and estimated annual donations;
- Wealth screening features that merge proprietary wealth scores and data from the WE database and merges it with an institution's constituent records to enrich them with wealth and lifestyle insights, while also detecting inaccuracies, then cleansing and updating data;
- A prospect segmentation tool to allow users to form highly segmented target prospect lists according to key characteristics of its most important donors and applying that criteria when searching the WE database;
- A social media analysis tool which automatically taps into donors' social networks to give access to social, professional and philanthropic connections that have the potential to broaden constituent networks;
- Lead scoring tools which use predictive analytics to score leads and identify top prospects in a point-and-click, web-based solution.

Higher Education Clients

WealthEngine reports that its services are used by advancement organizations at Duke University, Northwestern University, University of Pennsylvania, Oregon State University Foundation, Colorado State University, Roanoke College, and Trinity University.

Source: https://www.wealthengine.com/

Wealth-X

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
✔	Wealth Screening
	Alumni Networking/Membership

✔ *Primary Capability/Function*
✔ *Secondary Capabilities/Functions*

Vendor in Brief

Wealth-X maintains a collection of hand-curated dossiers of ultra high net worth individuals with a team of 200 employees located in five offices around the world.

The company provides services including wealth screenings and custom research, while its products include a database of high net worth individuals (Wealth-X Professional).

The solutions are used in financial services, luxury goods, nonprofits, and higher education institutions.

142 W 36th St. , 12th Floor
New York, NY 10018
(646) 861-7300
https://www.wealthx.com/

Key Product Facts

The core of Wealth-X's products and services is the dossier, which is a detailed profile of high net worth (HNW) individuals that includes information on background, wealth, interests, and connections. Its prospect research solutions include:

- A mobile platform that provides access from any computer or mobile device to a database of hand-curated dossiers on hundreds of thousands of wealthy individuals, with advanced search and filtering capabilities that can help uncover new leads, target the right prospects for campaigns, and stay up-to-date with existing donors;
- Access to current wealth profiles of the individuals in the prospect database, including international prospects;
- Custom research and diligence research services provide customized, in-depth research profiles on specific individuals to aid strategic decision making and meet regulatory requirements.

Higher Education Clients

EAB was unable to confirm which higher education institutions use Wealth-X services.

Source: https://www.wealthx.com/

Alumni Networking/ Membership

Primary Providers

AlumniFire 83
Graduway 84
NetCommunity 85
PeopleGrove 86
Switchboard 87
Wisr 88

Criteria for Inclusion

Online solutions for connecting alumni to each other and the institution have become necessary to engage younger, digital-first, graduates. These platforms typically operate as exclusive social networking platforms which give advancement staff the ability to collect alumni data, push engagement opportunities, analyze trends, and maintain a greater degree of institutional control over the digital alumni community.

Alumni Networking/Membership

Other products provide capabilities and functions for alumni networking and membership as a part of their advancement technology solutions.

Use the list below to find other solutions that may meet the needs of your institution.

Secondary Providers

Ellucian CRM Advance 15

EverTrue 63

Fundly 27

GiveCampus 28

Hubbub. 31

iModules 32

MobileCause 33

QuadWrangle 53

Reeher 66

RNL Complete Fundraising 55

Salesforce for Advancement 20

Slate 21

SocialToaster 56

AlumniFire

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔	Alumni Networking/Membership

✔ *Primary Capability/Function*
✔ *Secondary Capabilities/Functions*

Vendor in Brief

AlumniFire is a New York-based company that provides an independent grassroots alumni networking platform for members to exchange career advice, opportunities, and social interaction.

The platform is free for all members. Once a critical mass of alumni from a given institution register in the AlumniFire community, the community will go live, providing access to all members of the university's alumni community.

37 W 26th Street, Suite 207

New York, NY 10010

https://www.alumnifire.com/

Key Product Facts

AlumniFire is a turnkey social network exclusively available to college and university alumni. It is integrated with popular social networks like Facebook and LinkedIn, which allow new users to quickly register and input profiles by connecting their social media accounts to the platform. The basic features designed to promote digital networking among alumni communities include:

- Job and internship posting capabilities for staff and alumni members;
- Event marketing and management capabilities to organize and promote alumni-focused events;
- Data and reporting tools, including maps and dashboards, to give leaders resources to shape engagement strategy and measure outcomes from alumni outreach efforts.

Price

AlumniFire communities can be initiated by a group of alumni at no cost to themselves or their institution.

Higher Education Clients

AlumniFire reports that more than 720 active alumni communities have been started by alumni at Ohio State University, University of Michigan, University of Denver, American University, Vassar College, Sweet Briar College, Dickinson College, Trident University, and Centre College.

Source: https://www.alumnifire.com/

Graduway

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
✔ (secondary)	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (primary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Graduway was founded in 2013 in the United Kingdom as a digital platform for scaling alumni engagement, networking, and mentorship. Its value proposition is to leverage alumni networks to boost philanthropy, employability, and enrollment for its college and university clients.

Graduway's branded platform serves as a centralized alumni networking platform for current and former students, aiming to enhance the value of their college experience as well as the connection to the alma maters.

The company also hosts regular conferences focused on alumni engagement and career networking.

46 The Grove

London, London HA8 9QB, Great Britain

(978) 522-4335

https://graduway.com/

Key Product Facts

Graduway's branded platform serves as a centralized alumni networking platform for current students. Its platform allows current and former students to seek professional opportunities such as mentoring, jobs, internships, or introductions, as well as social ones like in-person events and affinity groups. Some of the network's key features and capabilities include:

- A single unified platform for alumni engagement and mentoring across colleges, schools, regions, and affinity groups;
- Customizable options and preferences to ensure a unique, personalized user experience;
- Integrations to popular CRMs to allow seamless updates to alumni contact, professional, and engagement data;
- A reporting dashboard to provide statistics on student and alumni activity that yields insight into engagement impact and constituent affinities.

Reported Results and Case Profiles

- University of California Los Angeles achieved a 42% rate participation on its alumni mentoring program, UCLA One.
- Tulane Connect alumni networking newsletters saw an increase in open rates from 50% to 75% after switching to the Graduway platform.

Higher Education Clients

Graduway is used by alumni relations teams at more than 150 colleges and universities, including: University of California Los Angeles, University of Arizona, University of Toronto, Tulane University, Johns Hopkins University, Bucknell, Rice, Ithaca College, and Colby College.

Source: https://graduway.com/

NetCommunity

Product Capabilities/Functions	
	Constituent Relationship Management
✔ (secondary)	Online Giving & Crowdfunding
	Marketing Automation
✔ (secondary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (primary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Blackbaud is a market-leading technology company in the higher education space. Its NetCommunity product is used by alumni relations teams to build stronger and more meaningful connections with their alumni bases. The tool allows alumni relations teams to house their administrative processes in one place, cutting down on manual tasks.

NetCommunity is one of many advancement technology products Blackbaud offers, making this tool particularly useful for Blackbaud customers due to its pain-free integration with other platforms such as Raiser's Edge.

65 Fairchild St.

Charleston, SC 29492

(800) 443-9441

https://www.blackbaud.com/products/blackbaud-netcommunity

Key Product Facts

In addition to myriad functions included in Blackbaud's advancement technology product suite, NetCommunity helps to provide support to alumni relations teams. The NetCommunity platform's features include:

- Online event management tools to help staff foster a personal connection between the institution and its alumni with high quality event programming;
- A personalized communication tool to include dynamic web content customized for alumni groups, ensuring the right message reaches the right audience;
- Campaign management tools such as integrated reporting functions that show which content resonates most with specific alumni segments.

Higher Education Clients

Blackbaud reports that its NetCommunity platform is used by alumni-facing organizations at University of Central Missouri Alumni Foundation, Regis College, Queen's University Belfast, North Georgia Community Foundation, and the University of South Dakota Foundation.

Source: https://www.blackbaud.com/products/blackbaud-netcommunity

PeopleGrove

	Product Capabilities/Functions
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
✔ (secondary)	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
✔ (secondary)	Event Management
	Wealth Screening
✔ (primary)	Alumni Networking/Membership

✔ *Primary Capability/Function*
✔ *Secondary Capabilities/Functions*

Vendor in Brief

PeopleGrove was founded in 2012 as a side project by two young Google employees who had benefitted from the invaluable advice given to them by alumni mentors. The company's solutions now span Enrollment Success, Academic Success, Career Success, and Alumni Success.

For its customers in university advancement and alumni relations, PeopleGrove provides a single touchpoint for alumni seeking community, connections and insight into their career paths.

59 Grant Ave, Suite 200
San Francisco, CA 94108
(650) 584-3400
https://www.peoplegrove.com/

Key Product Facts

PeopleGrove's Alumni Success platform's purpose is to connect alumni to the student community in a variety of meaningful ways. It is designed to connect constituents to engagement opportunities of interest, whether it takes the form of flash mentoring, in-person meetings, or volunteer events. The platform's features include:

- Dynamic alumni directory features such as searching, filtering, and visualizations to provide a better and more productive alumni networking experience to constituents;
- Job board and event management functions that provide a place for alumni to explore career opportunities and recruit fellow alumni to the community;
- Volunteer and affinity groups can also be set up on the platform, empowering volunteers to share meetings and events of interest with like-minded alumni;
- Badges, gamification, and social leaderboard features to encourage active participation.

Reported Results and Case Profiles

Georgetown University's Alumni Association switched to the PeopleGrove platform for its student-alumni career mentoring platform and saw a 75% rise in student requests to meet with alumni volunteers in the first year.

Higher Education Clients

PeopleGrove reports working with more than 150 advancement and alumni relations departments at colleges and universities, including: University of Pittsburgh, University of Southern California, Stanford University, Georgetown University, University of Notre Dame, and University of California Berkley.

Source: https://www.peoplegrove.com/

Switchboard

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Switchboard's alumni engagement and networking platform was created in 2012 under the premise that young alumni could find transformational opportunities in their communities, even after graduation. It describes its platform as an "opportunity clearinghouse", which has the twin aims of increasing alumni capacity through providing career advancement opportunities and fostering institutional affinity among these groups at the same time.

The platform is used across career services, alumni relations, and advancement teams in higher education, as well as in other education institutions like independent schools.

1300 SE Stark Street, Suite #304
Portland, OR 97214
(503) 482-9447
https://switchboardhq.com/

Key Product Facts

Switchboard's platform consists of a central community for students, young alumni, and established alumni to make "asks" and "offers", providing a way for alumni of all types to remain engaged with and find value in the relationships with their alma maters. Some features of the platform that are useful for advancement staff include:

- A single platform for integrating and augmenting the online community engagement work of advancement, alumni relations, and career services teams in a central location under the control of the institution;
- Registration forms to gather alumni data such as contact, location, and affinities, which can then be exported to donor databases for enhanced donor intelligence;
- Reporting and analytics tools allow users to identify the most engaged alumni prospects and tailor requests to existing donors with narratives that will resonate with them.

Reported Results and Case Profiles

- Switchboard says it can register more than 5% of an institution's constituent community on the platform in 12 months.
- According to the company 70% of users who make career-related posts say they found what they were looking for.

Higher Education Clients

Switchboard reports that it works with alumni-facing organizations at William and Mary, Portland State University, Antioch College, Occidental College, Kenyon College, Pitzer College, Longwood University, Willamette University, Bowdoin College, Reed College, and Oberlin College.

Source: https://switchboardhq.com/

Wisr

Product Capabilities/Functions	
	Constituent Relationship Management
	Online Giving & Crowdfunding
	Marketing Automation
	Multichannel Communications
	Prospect Data Analytics
	Fundraiser Workflow Management
	Event Management
	Wealth Screening
✔ (Primary)	Alumni Networking/Membership

✔ *Primary Capability/Function*

✔ *Secondary Capabilities/Functions*

Vendor in Brief

Wisr was founded in 2016 in Cleveland by a former admissions staffer at the University of Chicago. Professionals in career services, alumni relations, and advancement at five partner institutions (Case Western Reserve University, Cedarville University, Denison University, Oberlin College, and the University of Chicago) participated in the development of the Wisr platform.

The WisrConnect platform contains Enrollment, Student Success, Career Development and Alumni Relations modules, which can be deployed across campus to provide an integrated student experience.

2515 Jay Ave Suite 101

Cleveland, OH 44113

(216) 352-4172

https://getwisr.com/

Key Product Facts

Wisr’s platform is used by alumni relations teams to engage and build affinity with hard-to-reach young graduates who typically are less responsive to campus events and solicitations. The platform allows alumni to give back to their alma mater by connecting and sharing their insights with current students and recent graduates. Its key features include:

- A unified, easy-to-use alumni directory to replace outdated web directories and spreadsheets;
- Call, chat, and email communications functions to promote networking amongst alumni and current students;
- Tools to collect and update professional data from alumni and sync it back with university records;
- Matching algorithms that generate recommended student-alumni connections based on thousands of data points including academic interests, career aspirations, industries, personal goals, and extracurricular activities.

Reported Results and Case Profiles

The company reports that after Case Western Reserve University rolled out Wisr to alumni, it signed up more than 1,700 alumni advisors and 294 students in the first four months (it now has 2,500 advisors and 800 students).

Higher Education Clients

Wisr reports that it works with alumni-facing organizations at the University of Chicago, Stanford University, California State University Fullerton, University of Toledo, Case Western Reserve University, Oberlin College, Benedictine University, and Denison University.

Source: https://getwisr.com/

Appendix: Request for Information (RFI) Guide

Primary Providers

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To ensure that technology solutions meet expectations for a variety of campus stakeholders, including end-users in advancement organizations, as well as central IT and compliance staff, capturing information relevant to all parties from potential vendors early in the procurement process is imperative.

High Return-on-Request for Advancement and IT

Early Technical Information Capture Lowers Friction and Mitigates Risk

Creating a comprehensive vendor RFI allows advancement and campus stakeholders to build a full understanding of prospective partners and uniformly evaluate the suitability of products for advancement and campus needs.

Limited or no information captured in traditional contracting processes…

… results in numerous stumbling blocks that delay deployment.

Vendor Evaluation → **Decision and Contracting** → **Solution Implementation**

Inserting the RFI into the procurement processes adds minimal friction to the evaluation effort by shifting the burden of proof onto the vendor. It also hastens implementation and manages expectations by enabling accurate workflow and resource planning.

Vendor Evaluation → **Decision and Contracting** → **Solution Implementation**

Evaluation time *increased* by 5%

Implementation time *reduced* by up to 25%

	Common Pitfalls	Comprehensive RFI Solution
Accurate integration workflow planning	*Unknown integration requirements regarding endpoints, platforms, and languages create surprises in implementation*	*Granular information collected on vendor tools, languages and supported platforms allows appropriate selection and planning*
Pre-established compliance with policies	*New solutions fail to comply with internal and external policies (e.g. FERPA, HIPPA, architecture policies)*	*Institutional and industry compliance metrics are presented, and the burden of proof rests with the vendor*
Application lifecycle and maintenance planning	*Contracting efforts fail to appreciate ongoing costs and system support procedures, relying on vendor promises*	*Vendor support, update plans, and appropriate SLA information are gathered and incorporated into contract*
Appropriate Contracting	*Ill-fitting solutions and suboptimal contracts are signed by end users, who later find that new technology doesn't meet needs*	*Capability and architectural compatibility are assessed during the selection process, helping users make the right choice*
User Expectation Management	*End users grow frustrated when emerging roadblocks hold up implementations and slow time-to-use*	*End users appreciate the complexity of IT services. Implementation requirements and timelines are well understood.*

Source: EAB interviews and analysis.

Build Your Own Request for Information (RFI)

Building Your Own RFI: General Principles

Developing an institution-specific RFI requires gathering existing policies and guidance and codifying diverse information into a single document. The most effective RFIs will follow simple principles:

Be Direct

- Ask yes/no questions for clarity in answers
- Request specific elaboration in appropriate cases
- Provide examples of appropriate answers or standards in benchmarked questions

Keep it Technical

- Use technical specificity to educate end users and solicit technical responses
- Identify numerical and technical benchmarks that represent best practice

Make it Personal

- Insert institution-specific policies, guidance, and standards for vendor and stakeholder reference
- Rely on your subject matter experts to identify important queries

A Tool for You to Customize Your Own RFI

EAB has pre-formatted an Excel spreadsheet including all of the 190+ RFIs reviewed in this document, that members can edit as they wish and use to collect and compare vendor responses.

The spreadsheet can be accessed at the IT Forum website: https://eab.com/research/it/resource/comprehensive-vendor-rfi-template/.

EAB **Comprehensive Vendor RFI**

Customize this RFI for your Institution's Needs.

Company Legal Name:
Product Name and version:
Contact Name and Information:

Focus Area	Sub Focus Area	Assessment Question	Vendor Response	Notes:
Terms	Terms	Please attach a copy of the standard terms in a MS Word format for review.		Required
Contracts	Agreements	Provide copies of your company's latest financial statements and annual report, if applicable. Please provide gross sales, net income, and cost of sales for the past three years as related to products and services scoped in this proposal. These should be provided as an attachment to your response. a. What is your total revenue? b. How many customers do you have? c. How many Higher Education customers for the proposed product do you have in North America?		Informational
Contracts	Agreements	How long has your organization been in business? How long have you been providing this service?		Required

Source: EAB interviews and analysis.

Contracts RFIs

Sample Assessment Questions	
Agreements	How long has your organization been in business? How long have you been providing this service?
Agreements	Are you willing to agree with the terms and conditions of the Institution's Non-Disclosure Agreement? Need a link/reference.
Agreements	Licensing – how is product licensing handled? Are all components licensed from you, or are there certain components that the Institution will need to license directly with the product author? If so, what are these?
Agreements	Will you provide advanced notice of pricing changes?
Quality Assurance	Have you supplied products and/or services to the Institution or its Campuses in the last five years? If yes, please provide the Institution contact, describe the products and/or services offered and the total value of the services provided.
Quality Assurance	In the last 12 months, have you engaged an independent auditing firm to examine and report on your organization's controls (e.g. SOC 2 engagement performed in accordance with SSAE-16 or a SAS-70 audit)? If so, please provide a copy of the most recent Type II audit report.
Software Release	How frequently do you release significant new software versions?
Software Release	What is your expectation of client involvement in those software releases?
Software Release	Is there a cost for new software releases?
Software Release	Do clients have the option to not participate in or postpone an upgrade to a new release?
Company Overview and Background	Describe your organization's business background and ownership structure, including all parent and subsidiary relationships.
Company Overview and Background	Please validate our assumption that the Institution will contract with only one party which will be held accountable for all performance-related issues and any penalties associated with missed performance standards.
Company Overview and Background	Will your company provide all services, or will there be subcontracting. If the latter, can the Institution approve/reject the subcontractor? How will you assure that the sub will be subject to the same standards regarding security, service recoverability, and confidentiality (including circumstances that may involve off-shoring or multi-national agreements)?
Company Overview and Background	Please explain in detail any involvement in business-related litigation in the last five years by your organization, its management, or the staff that will be providing the administrative services.
Company Overview and Background	Please indicate the locations which will be engaged in delivering the scope of services and how locality (physical distance or local legal landscape) might interact with the performance or security expectations for your proposal. Is customer approval required before migrating across predefined geographic locations?
Company Overview and Background	Do you currently have any clients like the Institution, either in higher education or who are otherwise highly decentralized? If yes, can you provide a contact? If you can't reveal the university or company name, then just include type of education institution (or industry), general demographics, and services provided.
Account Management	What is your recommended account/relationship management structure for managing a relationship for the services you propose to provide?
Account Management	What are your resource requirements from the Institution for overall account management and contract governance?
Data	Are ownership rights to all data, inputs and outputs retained by the Institution? Are these rights retained even through a provider acquisition or bankruptcy event?
Data	In the event of imminent bankruptcy, closing of business, or retirement of service, will you provide 90 days for customers to get their data out of the system and migrate applications?

Institution Focused

Questions demand that the vendor comply with existing university policies and agreements, and place the burden of proof on the vendor.

Collaboration History

The vendor is required to disclose any existing services with the institution, to be used for review and negotiation.

Maintenance Planning

Future workloads and IT support are scoped in questions that ask for vendor commitments around update procedures.

SaaS-Vendor Sub Focus Area for Data

Questions around data ownership and data recovery force end users to consider the value of their data assets, and the institutions' right to the information gathered.

Source: EAB interviews and analysis.

Business Continuity RFIs

Sample Assessment Questions	
Plans	Does your organization have a comprehensive Business Continuity Plan?
	Is an owner assigned who is responsible for the maintenance and review of the Business Continuity Plan?
	Is the Business Continuity Plan written to address all hazards, or specific scenarios?
	Is your organization's Business Continuity Plan tested on at least an annual basis?
	Please indicate the last time that the Business Continuity Plan was tested and provide a summary of the scope and results.
Communication	Does your organization conduct training and awareness activities to validate its employees understand their roles and responsibilities during a crisis?
	Are specific crisis management roles and responsibilities defined and documented?
	Is there a defined problem/issue escalation plan for impacted clients?
	Is there a documented communication plan for impacted clients?
Supply Chain	Has your organization conducted an assessment to identify critical aspects of your supply chain that, if unavailable, would impact your organizations ability to deliver products and services to the Institution?
	Does your organization conduct annual tests with all critical suppliers that, if unavailable, would impact your organizations ability to deliver products and services to the Institution?
	Does your organization depend on non-US companies for the delivery of products and services?
Risk Mitigation	Does your organization's management assess business continuity risk and formally identify risk mitigation opportunities that may decrease the likelihood of a service interruption to the Institution?
Off-Site Capabilities	Does your organization have multiple locations for employees to use as Alternate Work Areas, and/or do you support workplace mobility? If so, please describe distance between facilities or employees mobility capabilities.

Brief for Non-SaaS
Only one ("required") question is for non-SaaS solutions.

Defining Expectations
Pointed questions delineate institutional requirements from vendors, with negative answers raising red flags.

Dual-Service Questions
Allowing IT to assess for compliance with data movement regulations and local-business supply chain requirements.

Focus Crossover
Sub Focus Areas within "Business Continuity" overlap with "Disaster Recovery" but solicit distinct information.

Source: EAB interviews and analysis.

Disaster Recovery RFIs

Sample Assessment Questions	
Recovery Prioritization	Can your organization commit to a Recovery Time Objective of 24 hours in the event you experience a disaster or significant business disruption?
	Can your organization commit to a Recovery Point Objective of 24 hours in the event you experience a disaster or significant business disruption?
Plans	Does your organization have a comprehensive Disaster Recovery Plan?
	Is an owner assigned who is responsible for the maintenance and review of the Disaster Recovery Plan?
	Is there a defined problem/issue escalation plan for impacted clients?
	Is there a documented communication plan for impacted clients?
	Are all components of the Disaster Recovery Plan reviewed at least annually and updated as needed to reflect change? Please describe that process.
	Do we have the opportunity to review your Disaster Recovery Plan(s) and supporting documentation?
Testing	Please indicate the last time that the Disaster Recovery Plan was tested and provide a summary of the results.
	Does your organization perform fully integrated end-to-end testing? If not, please describe the scope of your DR testing.
	Do the documented test results identify your organization's actual recovery time capabilities for technology and facilities?
	Based on your most recent Disaster Recovery Test, what was your actual recovery time?
	Does your organization's executive management review and sign-off on documented test summaries, which include test objectives, results, and recommendations?
Off-Site Capabilities	Does your organization have a Disaster Recovery site or a contracted Disaster Recovery provider?
	What type of availability does your Disaster Recovery site provide (hot/cold)?
	What is the distance (in miles) of the Disaster Recovery site from the primary technology location?
	Are back-up files, information and materials required to restore and operate key computing environments stored at the alternate site for ready access by authorized personnel?
Backups	Are back-ups of the operating system software, utilities, security software, application software and data files necessary for recovery stored at the DR site or another off-site location?
	If stored at another off-site location, what is the distance (in miles) between the primary site and off-site location?
	Please describe the process for backing up the servers on which the service resides. Are backup copies made according to pre-defined schedules and security stored and protected?
	Is media used for long-term retention of business data and archival purposes stored in a secure, environmentally protected area?
	Do procedures exist to ensure that retention and destruction of data meets established business and regulatory requirements?
	If desired, can the Institution extract a full backup? At what frequency?

Testing Best Practice
Asking pointed questions around identified best practice in disaster recovery identifies vendors with adequate measures in place.

Contingency Planning
Ensuring that the institution is able to establish disaster recovery options beyond those offered by the vendor. (Informational)

Mostly Required
All but one question regarding Disaster Recovery are "required" for SaaS vendors, reflecting the gravity of the information solicited.

Source: EAB interviews and analysis.

Systems Support RFIs

Category	Sample Assessment Questions
Application General	Does your solution support a phased modular deployment?
Application General	Does your proposed solution include any custom vendor-developed modules? If so, please describe the application(s), and how they will be developed.
Application General	Data conversion – please outline your approach to data migration from current Institution legacy systems. Do you provide any tools or accelerators to speed up or otherwise improve the data loading process? If so, please describe the tool and any technology requirements on the part of the Institution.
Application General	Describe your process to store, administer and report historical data in/from a Data Hub or other similar technologies.
Application General	Provide software interfaces for the dynamic exchange of data with various external systems.
Application General	What are your training options? E.g. Classroom instruction, hands-on training at the Institution Site/Vendor Site, online training?
Application General	Scalability – how does the solution design and infrastructure support growth and scale to multiple sites, nationally and globally?
Integration	What application integration technologies does the solution support?
Integration	Do you provide any standard interfaces to other vendor products (e.g., Workday, Oracle)? If so by what mechanism?
Integration	What Data extraction mechanism and standards you support?
Application Development	What database management system does the product require? Is a Data dictionary provided?
Application Development	If your product runs on multiple Operating Systems, what are the OS dependencies of the application. Describe the migration process from one OS to another.
Application Development	Do you support the uploading and storage of electronic documents? If yes, what security do you provide around this function? What are your record retention capabilities for electronic and imaged data?
Application Development	What workflow technologies/capabilities do you support for approvals, alerts, or process orchestrations?
Docs	What type of documentation is available for training, support, installation, etc.?
User Interface	How will users access the system? Do you provide a web interface? Which browsers are supported? Does your solution require other client software products?
User Interface	Can your system take advantage of mobile and/or GPS enabled mobile devices? Describe the capabilities. How is security ensured?
User Interface	What are your capabilities for extending, configuring, or customizing the user interface user interface?
User Interface	Ease of navigation: Do you offer any mechanisms for user friendly navigation? E.g. Quick paths, Context Sensitive help, etc.
User Interface	Do you provide on-line help to describe functionality, assist in locating a function or feature, or for descriptions of fields, contents, and acceptable formats?
Upgrades/ Patches	Describe your system development lifecycle methodology including your environments, version control and change management
Upgrades/ Patches	How frequently do you release new software? What is your technology roadmap for the next 2 years for enhancements and bug fixes? If a SaaS or vendor hosted solution, what are your expectation for the client in each release? How do you support client customizations from one release to another?
Upgrades/ Patches	Identify the most current version of the software. Detail the percentage of live customers that are utilizing the proposed version of the software. Please provide a breakdown of customers (by percentage) for each version of the software currently in use.

Compatibility Scoping
Defining institutional processes and infrastructure in questions requires vendors to articulate how their service or product fits with the institution's existing architecture.

Workflow Planning
Questions regarding technical specifications and integration needs allow IT to manage end user expectations and provide realistic timelines for implementation.

Education Provisions
Upfront requests for training information allow institutional IT to plan for implementation and advise on resourcing.

Source: EAB interviews and analysis.

Operational RFIs

	Sample Assessment Questions
Support	Is support available 24 X 7? Please describe your processes, procedures, and technology that enable 24 X 7 support.
	Do you offer an online-based mechanism for reporting errors or bugs with the service?
	Do you have an incident management system for identifying, submitting and tracking cloud service incidents?
	What is your response commitment for urgent tickets? Is it 15 minutes or less?
	What is your resolution commitment for urgent tickets? Is it 4 hours or less?
	What is your response commitment for non-urgent tickets? Is it 8 hours or less?
	What is your resolution commitment for non-urgent tickets? Is it 48 hours or less?
	What are the mechanisms for contacting your organization for support? Phone? Web? Other?
	Do you offer live human support via phone and/or instant messaging?
	What level of user and technical support documentation is provided and maintained? Is that doc covered by NDA or is it public?
Testing	What testing processes are established and followed (e.g., development of test plans, personnel involved in the testing process, and authorized individual accountable for approval and certification of test results)?
Change Management	How does your organization ensure that only application software verifiable as authorized, tested, and approved for production, and having met all other requirements and reviews necessary for commissioning, is placed into production?
	Are upgrades or system changes installed during off-peak hours or in a manner that does not impact the customer?
	Do procedures exist to provide that emergency changes are documented and authorized (including after the fact approval)?
Maintenance	What is your strategy for engaging (or at least notifying) customers regarding upcoming functional updates?
	Can an individual customer participate in the scheduling or request deferral of any specific update? Would any such deferral have a maximum timeframe?
Availability	Have expectations been established for the availability of all systems and underlying services? What is the minimum allowed outage time per month? How is that measured?
	Will you voluntarily inform the Institution of a service disruption?
	How does your organization measure availability? Does the definition of downtime start the minute the outage occurs (i.e., Is there a minimum time, such that, any outage less than the minimum is not counted)?
Data Center	Which data centers will be used to serve our application?
	Do you own your data centers or lease them? If the latter, from whom?
	How many Internet service providers (ISPs) do you buy connectivity from? Are they on separate telephone company entrances to the facility?

Expectation Setting

Specificity around operational support provides benchmarking for non-technical users to assess vendor responses.

Differentiating SaaS

Additional questions for SaaS vendors point out to end users that service use moves control beyond the power of the buyer.

Infrastructure Standards

SaaS vendors must provide information around data center use, benchmarked to industry best practice.

Source: EAB interviews and analysis.

Security RFIs

Sample Assessment Questions	
Encryption	Do you encrypt customer data in storage? If so, please explain what encryption techniques are employed and how encryption keys are managed. Include details about primary storage facilities as well as backups.
	Do you encrypt customer data during transmission across network boundaries? If so, please explain what encryption techniques are employed and how encryption keys are managed.
	Do you employ or allow any encryption algorithms that are not approved by the Federal Information Processing Standards (FIPS)?
Logging	Do you log electronic access to customer data? If so, please explain to what degree logging is employed, the retention period for those logs, how logs are protected, and whether they are accessible to the customer (and if so, how).
	Do you log physical access to customer data? If so, please explain to what degree logging is employed, the retention period for those logs and how logs are protected (e.g. access to datacenter, server, backup tapes, etc.).
Policies and Procedures	Do you have an Information Security Policy that pertains to customer data? If so, please provide a copy of the policy as well as any appropriate supporting documentation.
	Do you have a written Incident Response Plan ? If so, please provide a copy of the plan as well as any appropriate supporting documentation.
	Have you ever experienced a breach of customer data ? If so, what were the conditions of this breach and how was the investigation and response managed in conjunction with the customer?
	Are all employees required to sign a confidentiality agreement upon hire? If so, please provide a copy of the confidentiality agreement.
	Are all employees within your organization required to complete security training prior to accessing customer data?
	Briefly describe your security organization . Who is responsible for your information security program? What is the size of your security staff?
Data Separation	Describe how the Institution's data is physically and logically separated from that of other customers. Do you employ a single tenant or multi-tenant environment? If multi-tenant, what controls are in place to ensure a compromise of one customer's data does not lead to compromise of another customer's data?
Application Security	Please describe your approach and/or practices related to application security, including details about your development process as well as controls implemented in production.
	How do you monitor for and protect against common web application security vulnerabilities (e.g. SQL injection, XSS, XSRF, etc.). Do you perform both application and network layer vulnerability testing of your production systems on a recurring basis? If so, what is the frequency of your testing? See the OWASP Top Ten for a more complete list of application vulnerabilities.
	In the last 12 months, have you engaged an independent security firm to assess the security of your application? If so, please provide a copy of the assessment report.
	Will you allow the Institution to perform its own security testing of your application provided that testing is performed at a mutually agreed upon time and date?
Intrusion Monitoring	Do you employ network based intrusion detection or prevention? If so, please explain.
	Do you employ host based intrusion detection or prevention? If so, please explain.
	Do you employ any other controls to monitor for attacks? If so, please explain.
	Do you monitor for intrusions on a 24x7x365 basis? If so, is monitoring performed internally or by a third-party?

High Priority Questions

Security-related red flags are most likely to result in the delay or discontinuation of a project negotiation.

Who's Behind the Software?

SaaS-specific questions require information on vendor employees, who may have access to institutional data.

Open Questions

For open questions on technical issues, the quality of a vendor's answer can be indicative of commitment to service.

Source: EAB interviews and analysis.

Accessibility RFIs

Sample Assessment Questions	
Rehabilitation Act	Do the technologies and services you offer adhere to Section 508 of the Rehabilitation Act and the Americans with Disabilities Act?
Web Accessibility	If employing web-based technology, does your application conform with Level AA accessibility standards set forth in the WCAG 2.0?
	If your application does not fully comply with the WCAG 2.0 Level AA standards, please describe areas of weakness within your application and what steps are being taken to remediate these weaknesses.
	In the past 12-18 months, have you engaged an independent firm to evaluate that accessibility of your application? If so, please provide a copy of the audit report.

Federal Regulations
Identifying federal regulations reminds vendors and stakeholders that higher education institutions are subject to nationwide requirements.

Identity Management RFIs

Sample Assessment Questions	
Authentication	Does the product have a web based interface? [yes/no]
	If yes, are their multiple web interfaces and if so what are they used for? [customer facing portal, admin account portal, publically accessible portal, etc.]
	What type of authentication methods does the web interface(s) support? [SAML2, Shibboleth, CAS, Kerberos, Active Directory, OpenID, etc.]
	Does the product use the Internet2 Shibboleth implementation?
	If yes, does this product support Shibboleth/SAML2 authentication for Single Sign On? [yes/no]
Advanced Authentication	Does the product support the use of signed metadata? [distributed via InCommon, distributed locally, stored locally on the server, etc.]
	When an account logs into the application through the web interface, what account attributes are required from the user? [eduPersonPrincipalName, DisplayName, Email, Phone, etc.]
	Who will have access to this account attribute data? [The application user viewing data about him/herself, application administrators, other users viewing data about each other, etc.]
	How does the product authorize User access? Admin access? [local application permissions, local application groups, external groups, etc.]
Directory Integration	Does this product integrate with an external directory for user information? [yes/no]
	Does this product integrate with an external directory for group information? [yes/no]
	If yes to either of the above questions, which external directory does the product support? [Active Directory, Open LDAP, RedHat 389 LDAP, etc.]
Access Management	How are new users provisioned in the application? [via an LDAP integration, a one time import, feed file process, when they log into the application for the first time, etc.]
	How are new groups or roles provisioned in the application? [via an LDAP group integration, a one time import, provisioned by an admin inside the application, etc.]
	Does the product store user information in its own database? [yes/no]
	Does the product store group membership or role information in its own database? [yes/no]
	If yes to either of the above questions, how and when is the user or group access deprovisioned from the application?
Secure Auth.	Does the product support or integrate with Multi-Factor authentication? [DUO, Azure, VASCO, etc.]

Showcasing the Institution
Direct questions to uncover whether the application accepts authentication processes used at the university.

Data Mapping
Understanding the application programming allows IT to understand how the vendor's solution maps to the Institution's data objects.

Strategy Assessment
Understanding how the application or solution incorporates change allows IT to provide accurate information regarding management.

Source: EAB interviews and analysis.

Network RFIs

Sample Assessment Questions	
General	Where are CDN service nodes or Datacenters located?
	Does service have peering agreements with research/education networks (Internet2, NLR, TransitRail, etc.)?
	Does service use advanced IP protocols (IPv6, IP Multicast, etc.)?
	Describe the bandwidth requirements for connections between your systems and the Institution’s users.
	Describe the typical duration of transactions.
	Describe TCP/IP ports used between the service and any client or system that the Institution operates.

SaaS-Only Sub-Focus Area

Network assessment questions are only a requirement for SaaS applications

Ensuring Usability

With devices multiplying on campus, planning for bandwidth expectations is a crucial aspect of SaaS adoption.

Source: EAB interviews and analysis.

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