The 2014 Enterprise Application Market in Higher Education
Advancement and Fundraising
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What You Need to Know

From fundraising to marketing to alumni relations, advancement professionals manage relationships with a broad array of constituents including private donors, policy makers, and prospective and former students. To manage these relationships, they need a system that tracks contact information, engagement, contributions, and communications over time. The databases these systems rely on contain long histories of transactional data that are intertwined with the lifeblood of the institution: the need to raise funds and maintain engagement. Replacing these systems is challenging, and many of the major players in this space have honed their products over time. As a consequence, institutions are deriving the benefits of current functionality by staying with their chosen solutions. Without a compelling motivation to switch products, institutions have generally remained with their chosen solution, causing advancement/fundraising system to rank among the oldest of the core institutional systems (figure 1).

Figure 1. Characteristics of core information systems
These systems are nearly ubiquitous (used by 95% of institutions) and, depending on the culture of the institution, may be run by central IT or another unit on campus (figure 2).

![Figure 2. System provision and plans for change for advancement/fundraising systems](image-url)

Figure 2. System provision and plans for change for advancement/fundraising systems
Market Share

With nine-tenths of the market (87%) using a solution from one of the top 3 vendors—Ellucian, 41%; Blackbaud, 40%; and Abila, 6%—the advancement/fundraising system market is fairly homogeneous (figure 3).

![Figure 3. 2014 advancement/fundraising system market](image-url)
Market Shift: 2011–14

From 2011 to 2014, Blackbaud saw major gains in marketshare (29% in 2011 versus 40% in 2014); of the institutions that implemented a solution in the past three years, nearly half implemented Blackbaud Raiser’s Edge. During the same time period, Ellucian Banner Advancement saw a decrease in share (22% in 2011 versus 17% in 2014; figure 4). The rest of the market was relatively stable during this time period.

Figure 4. 2011–14 advancement/fundraising system market (top 5 solutions and homegrown)
Management Strategy

Although most institutions (74%) opt for an in-house implementation, one-seventh (14%) have a SaaS implementation, which may provide benefits such as scalability. Of the top 5 solutions (listed in order of market share in figure 5), Blackbaud Raiser’s Edge is most likely to have a SaaS implementation (26%). Its SaaS offering may contribute to Blackbaud’s recent popularity.

Figure 5. Management strategies in use for top 5 advancement/fundraising solutions
Deployment Strategy

Advancement professionals often need to interact with these systems while traveling; mobile-friendly user interfaces are essential for advancement/fundraising systems. One-quarter of institutions (25%) are using responsive web design. Of institutions using one of the top 5 solutions (listed in order of market share in figure 6), those with Ellucian Colleague Advancement are most likely to use responsive web design. More than half of institutions (55%) use another deployment strategy, mostly desktop implementations.

Figure 6. Deployment strategies in use for top 5 advancement/fundraising solutions
Case Study: Coordinating Advancement Data at Willamette University

The work of advancement offices—especially at small, private liberal arts colleges and universities—significantly impacts institutional planning and financial viability. To meet institutional fundraising goals, advancement offices need accurate and timely data. For example, up-to-date mailing addresses, telephone numbers, and e-mail address provide important first points of contact, while donor histories drive gift officers’ activities. The complexities of managing and maintaining these data amid organizational change became clear during a recent advancement system implementation at Willamette University.

Through the years, Willamette Integrated Technology Services (WITS) has managed a series of advancement systems. Initially it used Datatel’s Benefactor system, which WITS customized heavily. The most notable customization was a web-based front end to help Willamette’s Office of Development and Alumni Relations (Advancement) major gift officers work more effectively while traveling. When Datatel dropped the product, WITS adopted Ellucian’s Colleague Advancement system with much of the prior customization, until major personnel changes prompted a review of the system.

When the Colleague Advancement system administrator resigned, WITS found it increasingly difficult to support the system, especially given its extensive customization. In addition, the customizations began to perplex newly hired Advancement staff. The advancement system customizations predated their employment, and their lack of involvement prompted questions of system and data accuracy. Finally, new Advancement staff wanted a greater role in report generation. “There was general unease with the system,” stated John Balling, vice president, WITS. “Plus the Advancement staff desired a more modern, fully featured product.”

Given these complexities, WITS reassessed its system options, completing a functional analysis and product evaluation. Based on Advancement’s requirements and new staff members’ previous system experience, Willamette chose Blackbaud’s Raiser’s Edge. Implementation of a locally hosted solution began in fall 2012, with Advancement taking the project management lead. Raiser’s Edge went live in spring 2013. Locally, the implementation proceeded relatively smoothly; however, data transfer proved to be problematic. The Colleague Advancement system’s customized data-storage structure complicated data migration to Raiser’s Edge. When Raiser’s Edge data migration tools couldn’t complete the task satisfactorily, WITS wrote their own programs to transfer the data.
Data and system integration issues arose outside the system as well. Namely, other university offices, such as the registrar’s office, still use Colleague. “When you split up systems, you have different databases—whether they are in the cloud or not,” explained Balling. “The question becomes one of what is the single source of truth for any particular data element and how do you keep these systems synchronized. It is an ever-increasingly and complex task.” For example, once students graduate, there is a one-way transfer of their data from the registrar’s Colleague system to Advancement’s Raiser’s Edge system. And the university wants to ensure consistent data between the two systems, such as parent addresses.

Willamette took a number of steps to address these issues. In spring 2015, the university convened a data standards committee that comprised WITS, the Office of Institutional Research and Planning Support, Advancement, and the registrar. Today, the group is determining what addresses to capture and how to integrate them in university processes. For example, FERPA regulations limit the registrar’s ability to use parent address information, but it is essential for student emergency contact and advancement opportunities. In addition, outside consultants reviewed Willamette business practices in spring and summer 2015, and a new enterprise technology advisory committee will consider the system/business process implications of the consultants’ recommendations.

Overall, Willamette is pleased with the enhanced fundraising ability offered by Raiser’s Edge, including an easier-to-use interface and integration with Blackbaud’s NetCommunity online alumni relations and marketing suite. Future plans include a migration to the cloud with Raiser’s Edge NXT, continued fine-tuning of Raiser’s Edge capabilities, and improved integration with Colleague. One proposed solution to the latter is the assignment of a WITS staff member to work locally with the Advancement office.
Conclusion

As Willamette University found, system migrations can be challenging when customizations and integrations are involved. Data governance and cross-institutional collaboration are key when coordinating this type of effort. This advice is for the minority, however. Most U.S. institutions are not planning a migration in the near future and are already using mature systems. When the time does come to replace these systems, more than half of U.S. institutions will have to consider replacement or transition of their customizations. Institutions planning a system migration may find value in contacting peer institutions, like Willamette, that have overcome similar obstacles and to learn from their lessons.

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