Cloud-Based Advancement CRM and Fundraising Management System

SUNY Old Westbury requests proposals for a cloud-based Constituent Relationship Management (CRM) and fundraising platform designed to support higher education institutions, nonprofit organizations, and other fundraising organizations. The system will serve as the primary platform for alumni and donor engagement, fundraising operations, gift processing, event management, communications, reporting, and analytics.

The proposed solution should support the following functions:

• Create, manage, track, and report on constituent records (over 40,000 alumni, donors, parents, friends, corporations, foundations, and community partners).

• Maintain comprehensive alumni and donor records, including contact and demographic information, affiliations, relationships, engagement history, communications, event participation, volunteerism, and giving history.

• Track and manage fundraising campaigns, annual giving, appeals, donor solicitations, stewardship activities, grants, major gift opportunities, and gift officer activities.

• Process and manage gifts, pledges, recurring gifts, matching gifts, tribute gifts, sponsorships, and other fundraising transactions.

• Create recurring gift schedules and pledge payment plans with the ability to generate and track related gift transactions.

• Support tribute and memorial giving, including gifts made in honor or memory of individuals, organizations, or causes.

• Provide tools to identify, qualify, manage, and report on prospective donors, including donor research, prospect ratings, cultivation plans, solicitation activity, proposal tracking, and stewardship actions.

• Manage and maintain proposal submission opportunities including submission deadlines, ask amounts, proposal status, assigned fundraiser, and related notes.

• Support major gift and portfolio management activities, including prospect assignment, donor engagement tracking, moves management, and pipeline reporting.

• Create, manage, and report on special events by producing invitations and registration pages, tracking sponsorships and sponsor benefits fulfillment, attendance tracking, seating, communications, and post-event reporting.

• Create and manage constituent communications, including email marketing, segmented outreach, appeal communications, acknowledgments, and automated communication workflows.

• Support large-volume email distribution and communication tracking, including open rates, click-through rates, and constituent engagement metrics.

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• Schedule automated processes, workflows, reports, communications, and other system tasks to run unattended.

• Provide standard and customizable reports, dashboards, and data visualizations related to fundraising, alumni engagement, donor activity, campaigns, events, and organizational performance.

• Allow users to create custom reports, filters, dashboards, and data exports without requiring technical expertise.

• Export data and reports for use in Microsoft Excel and other common formats.

• Provide secure online giving forms and payment processing for one-time and recurring donations, event registrations, and sponsorship payments.

• Support payment processing through major credit cards, ACH/EFT transactions, DAFs, and other commonly accepted payment methods.

• Integrate with Microsoft 365 applications and provide APIs or standard integrations with financial systems, student information systems, payment processors, and other institutional technologies.

Preferred Features

The following capabilities are desirable but not required:

• Peer-to-peer fundraising and crowdfunding functionality.

• Artificial intelligence (AI) capabilities that assist with donor segmentation, prospect identification, predictive analytics, reporting insights, data quality management, communication drafting, and fundraising strategy recommendations.

• Data enrichment and record maintenance services, including address updates, phone verification, email acquisition, duplicate management, and constituent data hygiene.

• Advanced special event management including tiered ticket packaging and supporting online silent auctions.

• Online training resources, knowledge base access, and subscription-based learning opportunities for ongoing staff development.

• Volunteer management tools to track volunteer interests, availability, assignments, service hours, recognition milestones, and engagement history.

• Planned giving management tools to track bequests, charitable trusts, annuities, beneficiary designations, and other deferred gift commitments.