

Reduces amount of time spent managing each agreement for faster delivery of funding

Provides a comprehensive view into the preparation and progress of gifts at all times

Helps lower cost per dollar raised

Accelerate your institution's major gift agreement process

With fundraising for institutional advancement more imperative than ever, the need for an automated yet flexible gift agreement management process is rapidly growing. With OnBase by Hyland, advancement departments electronically orchestrate the gift agreement lifecycle from creation to review to approval and signature. Development officers integrate more closely with their gift agreement preparation and leadership teams across the institution to accelerate the processing and completion of major gifts. And because the entire process is visible in one place, staff have a transparent view into the status of every agreement, eliminating bottlenecks and enabling the advancement department to spend more time meeting with potential donors.



Enables completion of more gift agreements with transparent workflow

When it comes to major gift giving, colleges and universities historically engage with a small percentage of donors in their alumni bases. However, institutions are seeing a dramatic rise in donor interest to make major gifts as part of multi-year institution-wide fundraising campaigns, leading to the need to prepare an increased amount of gift agreement documents.

OnBase helps handle this increased volume by providing a central place to process agreements while seamlessly integrating with fundraising software systems. Via a custom-built e-form, OnBase captures required information from the agreement and submits it to the gift agreement preparation team. The completed form is automatically routed via workflow to the gift agreement officers, who no longer have to spend time tracking down missing information regarding donors' gift intentions and plans. With OnBase, key officers throughout the institution - including legal, academic and administrative leadership - easily ensure that agreements are fully prepared to be presented to donors for final approval.

Ensures full visibility into your gift agreement pipeline

As advancement staff collaborate on gift agreement document preparation, OnBase gives officers, leadership and staff a holistic view - including audit trails - into the preparation and progress of each agreement in their pipelines. This includes tracking and storing of all document versions, transaction dates, comments and last actions taken in workflow.

OnBase combines flexible workflow with the capability to create reports quickly and easily. Real-time reporting gives an automated dashboard view for institution staff and leadership to know precisely their progress toward specific major gift fundraising goals at any point in time, including instant creation of reports for gifts over or under priority giving thresholds.

Captures institutional knowledge from all completed gift agreements

Working to lower costs per every dollar raised, advancement departments need to do more with less to meet and exceed fundraising goals. To help drive staff productivity, OnBase empowers gift acceptance staff to speed creation of new unique agreements by instantly tapping archived, fully searchable content to reuse and repurpose into new agreements, dramatically saving time and effort. An indexed archive within OnBase provides the history of all agreements, including the complete document preparation history and all iterations created during each gift agreement development process.

With a central archive of all gift agreement documents and related content, advancement staff also maintain institutional knowledge and continuity of operations in times of department transition, improving team job satisfaction. Ultimately, OnBase gives advancement officers and staff the power to focus on their most important strategic priorities to strengthen their institutions for the long term, while freeing them from time-consuming, manual tasks and processes.

Learn more at OnBase.com/HigherEducation >>

“With the recent launch of NU’s \$3.75 billion comprehensive capital campaign, OnBase gives us a way to manage the gift agreement process so we can handle more requests, creating more gift documentation with the same number of staff. OnBase improves the process overall, requiring less time to manage the administrative tracking of each agreement.”

— Kristin Lewis, associate director, Information Management with Alumni Relations and Development, Northwestern University



This solution is one of many available in the OnBase Cloud.

OnBase[®]
by Hyland