DocuSign®

Offer a Seamless, Digital Major Giving Experience For Donors and Staff

At the core of any educational institution is a primary mission that takes resources to achieve. To keep a college or university growing in the right direction, advancement teams rely on major gifts from individual donors and corporations. Fundraising efforts have been greatly impacted by the pandemic, which eliminated in-person interactions with donors and forced teams to work virtually. Despite this challenging environment, 9 out of every 10 institutions met their revenue goals.[1] Throughout 2020, Advancement teams have increased their use of technology in order to meet donor expectations and provide stable funding for universities.

Taking the donor experience to a new level

Donors involved in a major or principal gift expect a higher level of service; they look for convenience and flexibility. Donors are busy, they don't want a complicated, time-consuming process that requires ink-and-paper signatures, scanning, faxing and mailing. Educational institutions that provide an intuitive, personalized, digital signing experience will build healthier long-term relationships with donors, creating the kind of affinity that leads to multiple major gifts to the institution.

Unlocking staff resources with seamless document workflows

Gift officers and advancement services staff can automate document generation and speed up the exchange of documents by using a digital platform that eliminates the need for in-person activities. With less time spent on paperwork and manually entering data, employees gain visibility into document status, and time back to focus on fundraising. A digital agreement platform like DocuSign allows development teams to scale their gift agreement processes while keeping operations staff lean, reducing their cost per dollar raised.

Minimizing legal risk and improving security of sensitive information

Sixty percent of advancement services professionals reported that the top risk to their ability to create and process pledges is agreements having outdated language. Advancement teams also want to avoid issues accessing funds due to conditional gifts or lose funding for scholarships if wording is too narrow. With DocuSign, advancement teams can create language libraries to ensure the correct, updated clauses are always used.

Institutions are also collecting important personal information about donors. DocuSign meets some of the most stringent US, EU and global security standards, and protects data at rest and in transit with AES 256-bit encryption.

Results

60%
of advancement teams say that expired or dated language impacts pledge processing

42%
of advancement teams say that incomplete review process results in sending incorrect agreement

58%
of advancement teams cite lack of visibility as a top frustration

"In a short period of time, we have found the improvement in user experience and time savings to be significant. Not only does the process of creating the donor intent agreement take less time, it also generates a more streamlined, simplified document which allows us to administer the gift more effectively."

Sherri Furman
Vice President,
Chief Financial Officer, Treasurer
University of Iowa Center for Advancement

The DocuSign Agreement Cloud for Higher Education

A modern system of agreement can free up an institution's advancement team to focus on what matters most: furthering the mission. With the Docusign Agreement Cloud, educational institutions can deliver a seamless donor experience, enable teams to track agreement workflows from anywhere, and provide the right language for each gift. It's the easiest way to securely connect and digitally transform donation paperwork, including negotiation, document generation, signature, reporting and stewardship. The result is fundraising that's more agreeable—faster, simpler and easier on the environment—and offers a better experience for donors, alumni and staff.

eSignature
Securely send and capture signatures on advancement agreements from virtually anywhere on any device,while maintaining a complete audit trail.

DocuSign CLM
Automate and manage the full agreement lifecycle with document generation, real-time collaboration, workflow routing and a central agreement repository.

ID Verification
A digital way to verify government-issued IDs, enabling donors to securely verify their identity before accessing advancement agreements.

DocuSign Insight
Find, filter and analyze all your existing agreements with purpose-built contract analytics, compare AI-extracted clauses and terms across agreements, and search agreements by concept, not just keyword.

DocuSign Analyzer
Automatically analyze clause and terms for incoming agreements, risk score contract content to guide faster action, directly access your library of pre-approved clauses.

Integrations
350+ prebuilt integrations with the leading platforms where advancement work is done, including Salesforce, Google and Microsoft.

eSignature API
DocuSign's secure and award-winning eSignature API makes requesting signatures, automating forms and tracking documents directly from your institution's advancement system.

Learn more about the DocuSign Agreement Cloud for Higher Education.

University of Iowa Center for Advancement results

35
Minimum number of minutes saved per execution of donor intent agreements in most simplified cases compared to their prior contract management solution

500
Average number of donor intent agreements executed per year

DocuSign CLM and eSignature
Use case

Use case examples

Major gift agreements and pledges, including planned gifts and corporate gifts
Personalized acknowledgements
Stewardship reporting
Volunteer engagement documents

DocuSign Agreement Cloud