

CUSTOMER SPOTLIGHT

The University of Montevallo



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—Lizbeth Juarez, Director of Comprehensive Campaign and Special Giving

The University of Montevallo, Alabama's only public liberal arts college, has a mission to provide students from throughout the state a high-quality and affordable, “small college” higher educational experience. The university serves an average annual enrollment of 2,600 undergraduate students across 35 degree programs, 88 percent of whom receive some type of financial aid. In 2022 the University launched a new comprehensive campaign with three main priorities: student access, affordability, and success; academic program support; and capital project support. To achieve the campaign's goal of raising \$30 million over seven years, the University's foundation team turned to its Blackbaud fundraising and analytics solutions.

University of Montevallo is powered by:

Blackbaud Raiser's Edge NXT®
ResearchPoint

University of Montevallo Builds a Prospect Research Function with Predictive Analytics

When Lizbeth Juarez joined the university foundation team in 2021 as the director of comprehensive campaign and special giving, she was the first team member explicitly tasked with conducting prospect research. In preparation for their upcoming MomentUM campaign, she began using Prospect Insights in Blackbaud Raiser's Edge NXT, ResearchPoint, and predictive analytics services from Blackbaud. With the help of a Blackbaud strategic consultant, Juarez identified

three key priorities to improve their prospect identification: building pipeline, identifying active donors with the potential to give more, and removing outdated portfolio assignments while implementing a more structured portfolio review process. “We knew that a number of our donors were aging out of major giving, so we wanted to be proactive about building a fresh pipeline of mid-level and major gift donors,” said Juarez.

Leveraging Artificial Intelligence to Surpass Fundraising Campaign Goals

As the sole researcher and with her time split between research and annual giving, the Prospect Insights tool in Raiser’s Edge NXT, gave Juarez the guidance she needed to automate and segment prospect lists without the need for extensive manual efforts. Prospect Insights provided AI-powered lists of constituents in need of attention, with prescriptive recommendations for major giving actions. “I was looking for a solution that would still allow me to do deep-dive research when needed, while allowing me to save time and be more proactive with prospect segmentation,” she said.



\$50K

Prospect Insights identified an alum who historically donated annually at a \$1,000-\$3,000 giving level had the capacity to give more. A major gift officer approached them and successfully secured funding for two \$25K+ endowed scholarships, both of which were paid in full.

At the launch of the public phase of their MomentUM campaign, Prospect Insights identified 211 assigned donors giving less than their estimated potential and 815 unassigned prospects with capacity and likelihood to give more than \$1,000. The tool also identified 57 assigned prospects with low likelihood to give a major gift and recommended their removal from major giving portfolios.

Over the next 10 months, Juarez reviewed nearly 1,500 constituent records using Prospect Insights, easily removing outdated or inaccurate prospect assignments, including those involving fundraisers who had left the organization. She also began updating prospect status designations and implemented a new process to track records of fundraising actions in Raiser’s Edge NXT.

Juarez also reviewed over 350 assigned prospects giving less than their predicted potential during this 10-month time period, qualifying and assigning 37 newly identified major gift prospects to fundraisers for cultivation. Building upon the recommendations provided by Prospect Insights and the process she put in place with the help of her Blackbaud strategic consultant, Juarez was then able to utilize ResearchPoint strategically to perform deep research on the foundation’s very best major gift prospects.

In one specific example, an alum who had donated annually within the \$1,000-\$3,000 range was identified as having capacity to give more, and the team ultimately ended up securing funding for two \$25,000 scholarships, paid in full.



\$37M

One year into its public phase, “MomentUM” raised \$37 million, surpassing the \$30 million goal.

Roughly one year after beginning the public phase, MomentUM had raised \$37 million against its initial goal of \$30 million. Because of this early success, the Board of Trustees decided to extend the campaign through February of 2028 and raise their goal to \$50 million.

Setting a Foundation for Fundraising Success

With built-in AI recommendations and a powerful prospect research platform, the University of Montevallo is well-positioned for fundraising growth. With solid processes in place for prospect identification and portfolio review, Juarez is focused on further developing the foundation’s policies and practices for prospect management. They’re also assessing their future pipeline and using the major giving potential identified within their database to make a case to grow their fundraising team.

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Identify prospects with the highest giving capacity and propensity.

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About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world’s leading cloud software company powering social good. Serving the entire social good community—nonprofits, higher education institutions, K–12 schools, healthcare organizations, faith communities, arts and cultural organizations, foundations, companies, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, data intelligence, and expertise. Learn more at www.blackbaud.com.



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