

Cloud Transformation in Higher Education

A Strategic Guide for Institutions



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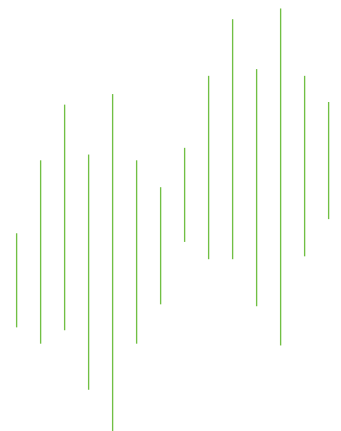
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CLOUD TRANSFORMATION TO DRIVE DIGITAL TRANSFORMATION

Digital transformation continues to create a radical shift in how higher education institutions engage with constituents and collaborate with colleagues and stakeholders across campus and beyond. The thriving, modern campus is embracing digital transformation as an opportunity to challenge traditional models and re-imagine what's possible, including for advancement operations and across the campus ecosystem.

Throughout the last decade, institutions of all sizes have followed the broader market trend of investing in digital and cloud transformation strategies. With the onset of the COVID-19 pandemic, institutions were faced with a need to transition to a remote workforce within a matter of days. For many, this external force dramatically accelerated the journey of integrating cloud computing into their general IT strategy. With cloud capabilities enabling increased collaboration, flexibility, interoperability, and agility, it is easy to see why this is a key pillar to power digital transformation in an ever-changing tech landscape.

Wherever an institution is on its journey to the cloud, thoughtful preparation and learning from other institutions can help ensure a more successful transition.

CLOUD TRANSFORMATION PREPARATION

Assessing the overall readiness of an institution is a complex undertaking. An important first step is for institutions to identify and define the goals they hope to achieve from migrating to the cloud. Common goals range from powering remote users to reducing IT costs to increasing flexibility to providing developers with a modern toolset. Having a clear understanding of goals will help institutions make decisions that support their overall objectives. As a starting point, below is a list of topics to help higher ed leaders prepare for a migration.

PRIORITIZING APPLICATIONS

As higher ed leaders design their technology strategy for cloud migration, they will likely go through the process of prioritizing applications or functions for migration. After all, it's unlikely that they will want to move everything to the cloud at once. As leaders prioritize their applications for cloud migration, some may consider starting with migrating smaller, low-risk applications first. While it can be a safe approach to start with smaller-scale applications, remember that the initial applications need to be complex enough to validate and inform the institution's broader cloud strategy. Upon deciding which applications to transition, then complete the detailed design work for the migration. The blueprint for success and learnings from that trial run will help inform leaders as they move up to the next application on the list at lower risk.

In this era of remote everything, digital transformation is no longer a vision of the future. As Satya Nadella of Microsoft said, "We've seen two years' worth of digital transformation in two months. From remote teamwork and learning, to sales and customer service, to critical cloud infrastructure and security."

IDENTIFYING PROCESS AND POLICY IMPLICATIONS

In many cases, technology change necessitates the need to revisit policies and agreements. Existing commitments and agreements that supported data exchanges may not be needed after a move from an on-premises to a cloud model. For example, an agreement to share data with a student information system may not apply if migrating an advancement CRM to the cloud. Take an inventory of these process and policy agreements when completing a current systems analysis and evaluate these potential areas early in process. Engaging with stakeholders early will provide an opportunity for leaders to strengthen relationships with campus partners as they refine the working model for the new era.

“The beauty of change management is that it can help support organizational success during times of significant transition and during everyday events.”

– Mike Reardon, Senior Principal,
Business Consulting Services,
Blackbaud

Want to learn more key change management concepts and strategies? Download the Blackbaud Institute’s “*The Root of Change*” whitepaper!

Download

“As one of the first cloud solutions implemented at Western University, Blackbaud CRM™ paved the way for the institution’s future cloud adoption strategy.”

– Drew Martin, Director for Technology Services, Western University

ENABLING RESOURCE READINESS AND ADOPTION

An effective change management strategy is critical when trying to successfully manage any kind of transition, especially for large dynamic changes, and it is consistently cited by leaders as a key area of importance when undergoing a complete cloud migration. The process of transitioning to cloud technology is a significant undertaking that presents exciting new opportunities—but it can also put a strain on existing resources and users. A move to the cloud brings change to the working environment of staff both in terms of practical knowledge, but also processes and even work identity. It is important for higher ed leaders to start planning early to ensure their resources have the best possible experience in the transition.

✓ Adding New Team Members

Plan early and identify what new skills will be needed for the team to be successful when recruiting for open positions. Ideally, institutions should begin searching for qualified team members during the planning phase. By doing so, new members can be a part of the transition and provide additional support.

✓ Preparing Existing Resources

First, make sure the general attitude of the staff is understood. Do they understand the decision to move to the cloud? Do they agree or disagree with the decision? Will they feel like they are “winning” or “losing” as a result of the change? Take the time to understand where they are, and thoughtfully communicate WHY the decision is made, how it is related to the greater institutional mission, and how it will impact them in their own roles. Answer their questions. Understand they may be nervous, confused, frustrated, and excited—perhaps even a mix of all those emotions! Make sure not to assume they know the reason or agree with the decision. A better-informed team is much more likely to get on board with the change.

Second, the importance of customized, hands-on training cannot be overstated. Institutions run a greater risk of existing staff resisting adoption of new technology when they are not given the proper training. Create training sessions that provide users with hands-on learning, practice completing daily tasks, and enough time to explore and get comfortable in their new work environment. To keep users engaged, ensure the training is relevant and tailored to where they are in the change process. If possible, use a training environment that is a copy of the production environment to provide users with the most realistic experience and a familiar dataset. For more technical users, technology-specific certifications may also be necessary and should be planned as early as possible.

ACHIEVING CAMPUS-WIDE COLLABORATION

Customers frequently cite "increasing collaboration across campus" as a priority when adopting cloud technology. In advancement, this often means connecting multiple colleges, departments, and campus/business units with a single solution that provides a single source of truth for donor, alumni, and constituent data.

Achieving the vision of true campus-wide collaboration can be more challenging than expected. Even with the best plans, change can be met with significant resistance if individuals or campus partners feel unprepared or that their perspective/needs were not considered during the implementation process. The best way to achieve adoption and collaboration is to communicate with stakeholders early and often.

When approaching the topic of cross-campus collaboration, the conversation sometimes turns to one on campus-wide technology and weighing the dichotomy of having a single platform to serve all versus multiple best-of-breed solutions.

The flexibility and interoperability of cloud technology makes it easier for advancement teams and other functions across campus to pursue solutions that best meet their specific needs, rather than adopt a more wide-spread campus tool that devalues department-specific needs. By considering the extensibility and interoperability of cloud solutions, departments can plan for collaboration and not have to sacrifice the capabilities that best serve their business needs.

Institutions should identify their various stakeholder groups and how they can engage them early in the process. It's important to take the time to understand how they are interfacing with the current technology solution and the impact that it will have on their work environment or experience. Once leaders can understand how the new technology will impact stakeholders, they can develop a communication plan to help foster engagement, achieve buy-in, and ultimately increase collaboration and adoption.

“At UofSC, cloud technology has provided an architecture for the flow of information and fostered stronger relationships and collaboration across campus.”

– Derek Clark, Assistant Vice President
Advancement Services, University of
South Carolina

PREPARING FOR DATA MIGRATION

Data cleansing is crucial for optimizing the effectiveness of a new cloud environment. This is an ideal time to take a close look at the data and determine the best course of action.



Purge: Legacy solutions may contain data that has no feasible use to the institution. If that data will no longer be of any use; institutions should consider purging it during the migration.



Archive: Large sets of data may exist in your system, from old projects for example, that doesn't serve a day-to-day function but still may be needed for reporting purposes. Archiving this data is a good option for preserving it without mapping it to the new environment.



Migrate: Prior to moving any data into the new environment, perform a data cleansing or hygiene step. This will help the validation phase go more efficiently and sets a solid foundation for a smooth migration.

MAKING THE CASE FOR CLOUD TRANSFORMATION

An important element that will likely be needed before beginning a cloud journey is creating an effective business case to secure leadership and/or board buy-in. Ultimately, the business case for cloud transformation should focus on a specific technology and how it aligns to the institution's strategy. It is important to remain focused on the institution's strategic goals and how the new technology will help achieve them and function within the existing and evolving ecosystem. Remember, just because a specific technology is implemented across campus, it does not necessarily mean that it is the best solution to meet those specific business needs or strategic goals.

At the highest level, new technology should improve an institution's business performance. A good strategy is to begin with the end in mind – the specific goals of the institution. Look for the technology that best supports those goals; this will generally translate to improved performance and will increase the likelihood of both users and stakeholders adopting the technology.

Like so many industries, the COVID19 pandemic has had a profound impact on higher education and the case for cloud transformation adoption. For example, with cloud technology, Bradley University was able to raise over \$400,000 from over 451 donors to aid affected students during its annual day of giving. The advancement team leveraged Blackbaud Raiser's Edge NXT to engage donors, support gift officer activities, update donor information, process gifts and track campaign activity as well as provide real-time reporting for leadership while working remotely.

“One of the benefits we realized with our cloud strategy was the ability to support our teams' transition to a remote workforce and provide them with shared access to information without any interruption.”

– Dwight Dozier, CIO, Georgia Tech Foundation

The theme of removing the burden of localized infrastructure to free up resources to focus on innovation and user needs is omnipresent. Traditional on-premises environments are supported by resources devoted to infrastructure, reliability tasks, keeping the database up to date, testing performance, managing security and risk for PCI, database administration, and server maintenance. Given these other responsibilities, these resources have limited capacity to drive innovation for institutions. By moving to the cloud with a technology provider that can provide a flexible and open system and is supported by a diverse partner network, institutions are better positioned to improve the experience for their internal users, students, alumni, donors, and friends.

Members from Blackbaud's Higher Ed Executive Advisory Board summarized the following benefits of moving to the cloud that they are most excited about for their institutions:

- Enable greater access to information, including to remote and virtual users
- Increase connectivity across the campus, saving time and effort, and driving increased outcomes
- Harness the power of data to drive smarter decision-making
- Deepen alumni engagement and enhance community outreach
- Accelerate time to innovation with a more flexible, open infrastructure
- Leverage an open partner marketplace

”If it weren't for Blackbaud Raiser's Edge NXT and the support of Blackbaud, we would not have been able to process gifts and update constituent records effectively during COVID-19. Our development officers were able to still engage donors and solicit funds for our #BravesTakeCare giving day to help Bradley students who are facing any unexpected challenges.”

– Alison Morrissey, Associate VP for Advancement, Bradley University



POWERING A CULTURAL SHIFT TO THE CLOUD AT GEORGIA TECH FOUNDATION

Since 1932, the Georgia Tech Foundation has fostered and managed gifts given in support of academic excellence in the spirit and traditions of the Georgia Institute of Technology. Using Blackbaud CRM™ in Microsoft Azure, the Georgia Tech Foundation is making greater strides in advancing its overall cloud strategy.

CIO of the Georgia Tech Foundation Dwight Dozier notes, “a cloud advancement CRM aligns with Georgia Tech’s overall technology strategy. Being in the cloud means we no longer have to maintain our own environment and enables us to focus our efforts on more strategic initiatives.”

“At stake is the risk of becoming additional digital noise in a crowded space. We must be personal, impactful in our objective of engagement and greater philanthropic support.”

– Dwight Dozier, CIO, Georgia Tech Foundation

Before the Foundation could focus on more strategic initiatives, Dwight knew that they needed to focus on the human element. As part of their preparation for cloud transformation, the Foundation focused on enabling a culture of change and transforming the organization to embrace a cloud culture. Examples of initiatives that the Foundation implemented include working to align staff through change management exercises, role-specific training, defining expected outcomes for the staff, and developing more purposeful job descriptions. These steps helped prepare staff for the cultural change as it occurred and helped them optimize efficiencies when they went live on their new cloud-based solution.

As Dwight describes, “Georgia Tech Foundation’s vision is to leverage technology that can assist in addressing the increased demand for services and support, and personalization-targeting goals. With the growing expectation of rapid and accessible decision point solutions, particularly as we look at addressing diverse types and channels of constituencies, deployment of enterprise cloud solutions enables change that is both bold and positive.”

Technology must partner with the willingness to change and innovate and to be bold and ensure positive human impact remains the objective. As Dwight explains, “The long-term impact of leveraging cloud technology will be transformational—we are very optimistic about what we can achieve both operationally and strategically given the possibilities now available to us. With the pace of innovation accelerating exponentially, institutions should be executing on their future vision now – the future is already here.”



CONNECTING SOLUTIONS IN THE CLOUD AT THE UNIVERSITY OF SOUTH CAROLINA

Among America's oldest and most comprehensive public universities, the University of South Carolina (UofSC) strives to deliver an outstanding student experience that is accessible for all. UofSC encompasses 16 distinct colleges and schools on its flagship campus, plus seven other campuses across the state. To connect its entire community seamlessly, the university began its cloud transformation in 2018 with the selection of Blackbaud CRM in Microsoft Azure.

For UofSC, the cloud offers the ability to connect solutions across campus securely and help teams collaborate more effectively. By bringing together the formerly disparate advancement, award management, and fund accounting units – all part of Blackbaud's Cloud Solution for Higher Education – UofSC is realizing not only data synchronization and transformative visibility, but a system-wide realignment that had not previously been possible.

As Assistant Vice President of Advancement Services Derek Clark describes, “Blackbaud CRM, Financial Edge NXT™, and Blackbaud Award Management™ coming together brings our data management and cross campus collaboration into a modern era.”

”The openness of Blackbaud's Cloud Solution for Higher Education is driving forward new opportunities and a new appreciation for the ability to integrate solutions across campus. The result is a more connected cloud that is strengthening the entire campus ecosystem.”

– Derek Clark, Assistant Vice President for Advancement Services, University of South Carolina



With the help of the Blackbaud team and leveraging its change management methodology, UofSC tackled the issues of risk management, cloud security, single sign-on, and cloud management head on from the beginning of the project. This approach allowed the team to overcome challenges early and freed staff to focus on the key areas of data management and data governance for the benefit of the institution.

CUSTOMER SPOTLIGHT

UofSC has already realized many transformative scenarios since connecting its offices in the cloud. The team is transferring approved scholarship applicants to the fundraising system for reporting and stewardship, where common deadlines across scholarship and fundraising functions are managed in concert across campus units. They are also streamlining the messaging needed to students and limiting confusion as well as using the impact of previous awards as part of its stewardship plans for prospective alumni donors.

Blackbaud CRM's open APIs are helping to forge new paths in data connections with third-party systems, including leading business intelligence solutions, network collaboration tools, and other applications serving enterprise needs across campus. For UofSC, connecting solutions to Blackbaud CRM in the cloud not only serves as a critical part of its cloud strategy but helped optimize virtual environment effectiveness in response to the coronavirus pandemic. UofSC has connected Blackbaud CRM with BI tools to surface dashboards both within the application and its overall dashboard library to increase transparency and serve stakeholders across campus. The openness of Blackbaud CRM has also allowed UofSC to surface Microsoft Teams directly within the solution, providing users with a seamless approach to reach front-line support staff for application support.

"The ability to connect Blackbaud CRM across key university functions and systems has helped UofSC improve transparency across campus and usher in an improved culture of collaboration," said Derek.



POWERING THE REEMERGENCE OF ANNUAL GIVING IN THE CLOUD AT WESTERN CAROLINA UNIVERSITY

Western Carolina University's Office of Development and Annual Giving recognizes the impact of having a thoughtful, person-to-person donor solicitation strategy. Prior to implementing Blackbaud's multi-channel, person-to-person cloud fundraising solution, the annual giving team relied on its legacy calling software and an outdated model that was cumbersome for students, which prevented them from being able to fully execute on their fundraising strategy.

“Our use of the solution is highly diversified. Being able to target the right people at the right time has helped us increase revenue by approximately 100% year over year.”

– Jonathan Brooks, Director of Annual Giving, Western Carolina University

Understanding the value of their phone program for university advancement, Director of Annual Giving Jonathan Brooks championed fiercely to expand the program. “For us, it was a no-brainer that Blackbaud Guided Fundraising was the right solution to support our future campaigns,” he said.

Both the implementation and adoption of Blackbaud Guided Fundraising were seamless, according to Brooks. “Students were really impressed with its interface, and from an administrative perspective, it was an easy transition with minimal challenges to overcome,” Brooks added.

Blackbaud Guided Fundraising is the primary tool used for the annual giving team's engagement efforts. In addition to fundraising, they use it for prospecting for gift planning, alumni outreach, event invitations, and for contacting parents and other parent activities. “Our use of the solution is highly diversified,” Brooks said. “Being able to target the right people at the right time has helped us increase revenue by approximately 100 percent year over year—and our donor capture rates through our phone program have increased by about 20 percent year over year.”

Plus, with the right technology in place, Western Carolina's annual giving team can be agile when plans change unexpectedly. “Upon COVID-19, we easily pivoted to student emergency check-in calls for our populations who were highly at risk,” Brooks said. “We also suppressed our healthcare contact lists to ensure they weren't overburdened with messages and solicitations while working on the front lines.”

With Blackbaud Guided Fundraising, the annual giving team can easily share where donations are going and how they are supporting student and academic success. “The students have an easier time interfacing with people, and the reporting is a lot better,” Brooks said.



CREATING A POLICY BLUEPRINT FOR CLOUD IMPLEMENTATIONS AT WESTERN UNIVERSITY

Founded in 1878, Western University delivers an exemplary learning experience that engages the best and brightest people challenging them to meet ever-higher standards in the classroom and beyond. The implementation of Blackbaud CRM led the university's cloud transformation as one of the first university systems to migrate to the cloud.

Among the outcomes of cloud migration for Western University was the need to restructure data sharing agreements among campus partners. With historical agreements for data sharing written with language specific for on-premises systems and deployments, migrating to cloud technology meant that these agreements needed to be restructured. Reengaging with partners across campus to rework these agreements gave the university the opportunity to develop a newly enriched partnership and ultimately create a more beneficial outcome for the institution. The conversations led to more specific agreements on internal and external SLAs and data sharing policies – including privacy considerations and offered the opportunity to set the standard for future cloud negotiations. “In addition to powering fundraising and alumni relations, Blackbaud CRM also serves as a primary institutional source of truth for student records,” said Drew Martin, director for technology services at Western University. “As one of the first cloud solutions implemented at Western University, Blackbaud CRM paved the way for the institution's future cloud adoption strategy. The journey with Blackbaud has just begun and we are excited about the path ahead.”





Regardless of where an institution may be on its digital transformation journey, cloud transformation will help position the institution to succeed. [Learn how Blackbaud can help your institution master its journey to the cloud.](#)

ABOUT THE AUTHORS

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Alison serves as the Senior Manager of Vertical Marketing for the Higher Education Solutions team. In her role, Alison is responsible for leading the go-to-market strategy for the enterprise market and the content strategy for the vertical. In her 15 years at Blackbaud, she has managed the CRM Product Marketing Portfolio team, served as a Senior Enterprise Solutions Engineer, and worked as a Principal Consultant, where she worked with International and North American customers to successfully implement Blackbaud solutions. Prior to joining Blackbaud, she served as the Director of Information Systems for the Detroit Symphony Orchestra, overseeing technology initiatives including, fundraising, ticketing, and marketing systems. Alison lives in Chicago, IL with her husband and four-year-old son.

Bill Walsh Chief Architect and Technology Evangelist

Bill has 27 years of experience as a leading expert in fundraising database systems. Bill worked in aspects of software development, eventually spending several years as Director of Software Development for The Raiser's Edge product line. He was responsible for all software releases and updates, customer product satisfaction, and software life cycle activities. In 2007, he led the efforts to take Blackbaud into the Enterprise market space with the newly launched Blackbaud CRM solution. Working directly with large and sophisticated institutions world-wide provided first-hand experience in scaling up and out fundraising systems and processes. Today Bill serves as a leading voice of trends and topics in Technology for the Enterprise market, speaking to the issues of the day and advising Blackbaud and Institutions with trusted commentary.

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