



SOLE/SINGLE SOURCE COVER LETTER

Date: 06.26.2026

Vendor: Virtuous Software Inc.

Product/Service: Virtuous CRM & Marketing Automation, Virtuous Momentum, Premium Support, Advanced Onboarding, and related implementation and integration support

Division: Strategic Initiatives, Development, and External Relations **Department:** Development

Amount: \$184,888.00 (3 Year Contract + Professional Services Investment)

This sole source request is submitted in support of the University's proposed agreement with Virtuous Software Inc. for the purchase of Virtuous CRM & Marketing Automation, Virtuous Momentum, premium platform support, advanced onboarding, and related implementation and integration support to assist Florida Polytechnic University's (Florida Poly) advancement, donor engagement, fundraising, career services, and partnership management operations.

Florida Poly's needs are unique within the State University System (SUS) because the University is still a young institution with a developing alumni base, emerging donor pipeline, growing advancement infrastructure, and expanding employer and partnership engagement efforts. Unlike longer-established SUS institutions with mature alumni networks and established fundraising ecosystems, Florida Poly requires a platform that can help build, identify, cultivate, and manage relationships from an earlier stage of institutional development.

For Florida Poly, advancement and external engagement are not limited to managing a traditional alumni or donor database. The University must actively develop relationships with alumni, friends of the University, employers, industry partners, corporate supporters, community stakeholders, prospective donors, mentors, sponsors, and strategic partners. Career Services and Partnership Management were also key stakeholders in evaluating the platform because many of these external relationships overlap and may serve multiple institutional purposes.

Accordingly, the University requires a connected platform rather than a narrow donor database, isolated fundraising tool, or collection of separate point solutions. The required solution must support coordinated relationship management, donor discovery, personalized outreach, automated engagement, fundraiser productivity, activity tracking, communications, analytics, and scalable workflows across Advancement, Career Services, and Partnership Management.

The services and software contemplated under this request are not ordinary CRM or donor management services available from multiple providers in the same manner. The University's requirement is for a single, nonprofit-specific advancement platform that combines donor relationship management, marketing automation, segmentation, communications tools, online giving, event registration, wealth and social data insights, analytics, major-gift pipeline support, fundraiser workflow tools, AI-assisted outreach, automatic activity capture, open API capabilities, premium support, advanced onboarding, and related implementation support.



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The basis for this sole source request is the proprietary and uniquely integrated nature of the Virtuous solution. Virtuous Software owns and controls the Virtuous CRM & Marketing Automation platform, Virtuous Momentum, and the supporting platform functionality that allows these tools to operate together as one advancement and fundraising system. Because the University requires this combined functionality to operate in a unified platform from a single vendor, Virtuous Software is uniquely capable of providing the specific combination of software, implementation, integration, support, and platform capabilities required.

Florida Poly is not seeking a solution that would require custom development, manual exports, third-party workarounds, disconnected user workflows, or multiple vendors to replicate the same operating environment. The University's need is for a unified advancement platform with built-in nonprofit fundraising workflows, major-gift productivity support, automation, communications, donor engagement tools, direct vendor accountability, and implementation support that allows the University to transition efficiently and build a sustainable advancement operation.

The University reviewed alternative nonprofit fundraising and donor management platforms. While those platforms may address portions of donor management or advancement operations, the alternatives reviewed do not meet the University's required combination of nonprofit-specific CRM functionality, marketing automation, major-gift workflow support, Virtuous Momentum capabilities, automated CRM activity capture, premium support, advanced onboarding, and integrated platform experience in the same manner as Virtuous. The University's requirement is based on the integrated platform configuration as a whole, not any single feature in isolation.

The availability of prepackaged connector options through Omatic is also a significant implementation advantage because it directly reduces the time, internal development effort, and technical resources required to connect the new advancement CRM to existing University systems. Based on IT review, some alternative platforms would require additional in-house development, staff time, and implementation support to meet the University's anticipated integration needs. This difference is material because the University must complete implementation and transition by the end of the calendar year. While integration is not the sole basis for the sole source request, it is a significant operational factor supporting the University's determination that Virtuous provides the more complete functional and implementation-ready solution.

The University previously issued a CRM solicitation; however, through that process, the University determined that the specifications did not accurately capture its actual advancement, donor engagement, fundraising, career services, and partnership management needs. The solicitation was canceled because the scope was not sufficiently developed, and the submissions received did not align with the solution the University ultimately needed.

Following the canceled solicitation, the University continued due diligence through vendor demonstrations, stakeholder discussions, and review of available platform capabilities. Through that process, the University refined its requirements and determined that it did not want to repeat prior operational challenges by selecting a solution that would require multiple disconnected systems, custom workarounds, manual processes, or a patchwork of separate products to meet its needs.

Based on this refined understanding, the University identified a need for a fully integrated advancement and external engagement platform that supports donor relationship management, fundraising workflows, marketing automation, communications, online giving, major-gift activity, analytics, onboarding, and implementation



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support within one connected system. Virtuous Software Inc. was identified as uniquely capable of providing this solution in a manner that aligns with Florida Poly's current stage of advancement maturity, implementation timeline, and long-term fundraising and partnership goals.

This purchase will benefit the University by supporting modern advancement operations, improving donor and relationship management, reducing manual administrative processes, strengthening fundraiser productivity, and creating a more coordinated and data-informed approach to external engagement. The platform will support the University's ability to manage donor relationships, employer relationships, industry partnerships, alumni engagement, career-related partnerships, engagement activity, communications, advancement workflows, and long-term fundraising and partnership growth.

Florida Poly is contracting directly with Virtuous Software Inc., the organization that owns and provides the software, services, support, onboarding, and proprietary platform functionality described in this request. There are no distributors, resellers, or third-party intermediaries involved.

Based on the information provided by the requesting department and the supporting documentation included with the sole source certification, Procurement affirms the request to proceed on a non-competitive basis for this acquisition in accordance with BOG Regulation 18.001(6)(b).

Respectfully,

A handwritten signature in black ink that reads "Mercedes B. Gazaway".

Mercedes B. Gazaway
Director, Procurement



Department: Advancement Requisition #: Dollar Amount: \$ 184,888.00

Note: This Sole Source Certification will become a public document, open to public inspection; therefore, you should be certain all material facts are true, relevant, and clearly understandable.

Per Florida Polytechnic University Purchasing guidelines, the following is submitted in support of this request for authority to purchase, without bidding, the items available from only one source.

Sole Source means that the item/service is unique or that the vendor is the only one from whom the item/service can be provided. Best Price alone cannot be used for sole source. If the item/service is available from more than one source of supply, best price must be determined through the competitive bid process.

A. Sole Source Vendor

Company Name: Virtuous Software Inc.
Telephone: 866.329.4009

Address: 1 North 1st Street Suite 600
Phoenix, Arizona 85004

B. Describe in lay language, what the item/service is and how it is to be used.

Florida Polytechnic University is purchasing Virtuous CRM & Marketing Automation, Virtuous Momentum, premium support, advanced onboarding, and related implementation and integration support. The platform will support advancement, donor engagement, fundraising, career services, and partnership management by helping the University manage external relationships, track engagement, support communications and online giving, provide analytics, and coordinate workflows across key stakeholder areas.

C. What feature or special condition of this commodity/service is unique or cannot be obtained from any other source?

The unique feature is the fully integrated Virtuous platform, which combines CRM, marketing automation, online giving, event registration, analytics, major-gift workflow support, Virtuous Momentum, premium support, onboarding, and integration capabilities in one connected system. Virtuous Software Inc. owns and controls Virtuous CRM & Marketing Automation, Virtuous Momentum, and the supporting platform functionality. Because the University requires this specific combination of tools to operate together from one vendor, Virtuous is uniquely capable of providing the required solution. The platform also supports Florida Poly's unique need to build and manage donor, alumni, employer, industry, and partnership relationships from an earlier stage of institutional development.

D. Is this product being purchased directly from the manufacturer? Yes

E. Prior to submitting this requisition, did you investigate other possible sources? Yes

If Yes:

Did you obtain quotes from the other sources? Yes

If yes, attach copies.

Is this Vendor's price lower than the other sources? See below

If No:

Justify the additional cost below.

Although Virtuous may not be the lowest-priced option, the additional cost is justified because it provides the University's required CRM, marketing automation, donor engagement, major-gift workflow, support, onboarding, and integration capabilities in one connected platform. Other options may address portions of the need but would require additional tools, workarounds, internal development, or manual processes. Virtuous provides the most complete solution for the University's functional needs and required implementation timeline.

F. Other Sole Source comments or explanations.

Florida Polytechnic University requires a platform that can support relationship management across multiple external-facing functions, including Advancement, Career Services, and Partnership Management. Because Florida Poly is a young institution, its alumni network, donor base, employer relationships, and partnership structure are still being developed and require a system that can grow with the University. Many of the University's external contacts may serve in more than one capacity, such as donor, alumni contact, employer, sponsor, mentor, industry partner, or strategic partner. The University therefore needs one integrated system to track, manage, and coordinate these relationships rather than using separate systems or manual processes. Based on stakeholder review, market evaluation, implementation needs, and the integrated functionality of the Virtuous platform, Virtuous Software Inc. has been identified as uniquely capable of meeting the University's requirements.



I / We, the undersigned, certify the above to be true and correct to the best of my / our knowledge and belief and the user and / or undersigned does not have a financial interest in the above-named vendor.

<p>DEPARTMENT APPROVAL</p> <p>I hereby certify the validity of the information and feel confident the Sole Source Certification will meet University criteria and would withstand any audit or vendor protest.</p> <p><input checked="" type="checkbox"/> <u>Stefano Weingart</u> 06/26/2026 VP/Department Head Signature Date</p> <p><input checked="" type="checkbox"/> <u>Jonathan Gauthier</u> Digitally signed by Jonathan Gauthier Date: 2026.06.26 16:55:42 -04'00' Procurement Official Signature Date</p> <p><input checked="" type="checkbox"/> <u>[Signature]</u> 06/26/2026 University Attorney Date</p>	<p>PROCUREMENT APPROVAL</p> <p>This acquisition is approved as a non-competitive purchase.</p> <p>Public Posting Date: <u>06.26.2026</u></p> <p>Public End Date: <u>06.29.2026 5:00 PM ET</u></p> <p><input checked="" type="checkbox"/></p> <p>Procurement Director/Delegate Signature Date</p>
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Please Note: Failure to timely file a protest or failure to timely deliver the required bond or other security in accordance with the Board of Governors' Regulations 18.002 and 18.003 shall constitute a waiver of protest proceedings.

Order Form

Customer Name - Florida Polytechnic University
 Company Phone - 863-874-8700
 Address - 4700 Research Way, Lakeland, FL 33805
 Start Date - Agreement starts upon signature
 Subscription Term - 36 from signature date
 Terms of Payment - Due Net 30
 Billing Frequency - Annually

Subscription Investment

Name	Price	Years	Subtotal
<p>██████████ A Holistic Generosity Platform</p> <p>██████████ CRM & Marketing Automation</p> <ul style="list-style-type: none"> Up to 20,000 Contact Records Includes 100,000 email sends/month ██████████ Online Giving (Powered by ██████████ Raise) Includes Embedded & Custom Landing Pages, Donor Portal & Multiple Digital Wallet Payment Options (Venmo, Paypal, Apple Pay, Google Pay) ██████████ will power all new and existing online one-time and recurring donations. Estimated Online Volume Based on Last 12 Months processing: \$44,000 ██████████ Event Registration ██████████ Insights for Wealth & Social Data - 25,000 Contacts Letters On Demand Bulk Rates - \$1.49/Letter \$0.99/Postcard 3,500 SMS text sends/month ██████████ Analytics ██████████ SSO and Directory Access ██████████ Email Sync - 20 Users 4 NCOA Address Appends Per Year Up to 100k Individuals 4 Deceased Appends Per Year Up to 100k Individuals Unlimited storage of data Mobile app access Open API Unlimited marketing automation workflows <p>██████████ Premium Support</p> <ul style="list-style-type: none"> Unlimited Phone Support for 2 Designated Admins Unlimited Email/Ticket Support w/ <1 hour Response Time Access to ██████████ Support Portal to review ticket history and statuses 	<p>\$42,508</p>	<p>3</p>	<p>\$127,524</p>
<p>██████████ Momentum (2 Fundraisers)</p>	<p>\$15,000</p>	<p>3</p>	<p>\$45,000</p>

- Momentum helps mid and major gift officers reach the right donors, personalize outreach effortlessly, and automatically sync every detail to the CRM
- Includes 2 MGO seat + 1 Admin user Only

Discount **-\$18,450**

Total \$154,074

Professional Services Investment

Name	Price
Advanced Onboarding - Raiser's Edge <i>Includes: 45 hours of Strategic Consulting, One Analytics Dashboard Build Out, Robust Data Cleanup, & Four Automation Builds</i>	\$40,800

Discount **-\$9,986**

Total \$30,814

Grand Total

Name	Price
Software Subscription	\$154,074
Professional Services	\$30,814

Total \$184,888

Payment Schedule

Name	Price
Year 1 - Professional Services	\$30,814
Year 1 - Software Subscription	\$51,358

Year 2 - Software Subscription	\$51,358
Year 3 - Software Subscription	\$51,358
Total	\$184,888

Fees shown above do not include any sales taxes. Any sales taxes will be determined based on the laws and regulation of taxing authority(ies) governing the Billing Address provided by the customer on this Order Form. If applicable, please provide a valid tax exemption certificate authorized by the appropriate taxing authority.

Tab D: Financial Proposal



Estimated Solution

LINE NO.	PART NO.	DESCRIPTION	QUOTE PRICE	QTY	EXTENDED PRICE
1	200004873-2	Data 160 Provisioning Start Date: 04/22/2026 End Date: 04/21/2027	\$0.00 OM	1	\$0.00
2	200003130-2	Education Cloud - Unlimited Edition Start Date: 04/22/2026 End Date: 04/21/2027	\$1,850.08 OM	30	\$55,502.40
3	200000469-2	Marketing Cloud Account Engagement - Advanced Start Date: 04/22/2026 End Date: 04/21/2027	\$28,070.18 OM	1	\$28,070.18
4	200000488-2	Marketing Cloud Account Engagement - Business Unit Start Date: 04/22/2026 End Date: 04/21/2027	\$12,759.17 OM	1	\$12,759.17
5	2000038744-2		\$0.00 OM	1	\$0.00
6	200004650-2	Foundations - Entitlements - Flex Credits Start Date: 04/22/2026 End Date: 04/21/2027	\$0.00 OM	1	\$0.00
7	200004289-2	Mulesoft - Mulesoft Integration - Starter Start Date: 04/22/2026 End Date: 04/21/2027	\$39,298.25 OM	1	\$39,298.25
8	2100000001-2	Product Unlimited Edition (Administrator) - Cross Start Date: 04/22/2026 End Date: 04/21/2027	\$0.00 OM	1	\$0.00
9	200004650-2	Entitlements - Flex Credits Start Date: 04/22/2026 End Date: 04/21/2027	\$0.00 OM	1	\$0.00
10	200008744-2		\$0.00 OM	1	\$0.00
11	200002810-2	Data Cloud Provisioning Start Date: 04/22/2026 End Date: 04/21/2027	\$0.00 OM	1	\$0.00
SUBTOTAL:					\$135,630.00

Estimated Effort & Fees

Estimated Effort & Fees		
Phase	Estimated Hours	Estimated Fees
Discovery & Design	485	\$96,000
Core Build & Configuration	765	\$133,000
Integrations, Marketing Enablement & Reporting	650	\$120,000
Testing & Training	620	\$108,000
Go-Live & Stabilization	230	\$42,000
Total Estimated Fees	2750	\$499,000
Estimated Solution		\$135,630
Total Estimated Cost to FPU		\$634,630

Professional Rates	
Managing Director	\$330
Director	\$295
Associate Director	\$270
Senior Manager	\$230
Manager	\$200
Senior Consultant	\$170
Consultant	\$140

Client Responsibilities

- Designate an executive sponsor with authority to make timely decisions.
- Assign a project manager to coordinate University resources and approvals.
- Provide access to appropriate subject-matter experts for discovery, validation, and testing.
- Participate in scheduled project meetings, workshops, and reviews.
- Provide timely feedback and formal approvals aligned to the project schedule.
- Procure and maintain required [REDACTED]
- [REDACTED]
- Ensure licenses are provisioned and available prior to related configuration activities.

- Provide data extracts from identified source systems in agreed formats and timelines.
- Validate migrated data and approve reconciliation results.
- Provide access credentials, endpoints, and documentation for integrated systems, including Workday.
- Support integration testing and confirm accuracy of synchronized data.
- Define and approve security, privacy, and role-based access requirements.
- Assign users to participate in System Integration Testing (SIT) and User Acceptance Testing (UAT).
- Ensure end users attend required training sessions.
- Support go-live readiness, cutover approvals, and transition to steady-state operations.

Assumptions

- [REDACTED] product licenses will be procured by the University prior to configuration activities.
- Workday APIs and credentials will be available for integration development and testing.
- The University will provide data extracts and subject-matter expert participation for validation and testing.
- Final selection of event management and screening vendors may occur post-award, provided functional requirements remain consistent.
- Any material changes to scope, data volume, or integration complexity may require a change order.

Optional AI Enablement Supported by a Governed CRM Foundation

WHERE AI ADDS PRACTICAL VALUE

<p>PURPOSEFUL USE OF AI</p> <ul style="list-style-type: none"> AI is applied selectively to support staff efficiency, constituent visibility, and informed decision making — not to automate core operations. AI is not required for Phase 1 success. Every core function operates without AI dependency. No AI capability introduces delivery, compliance, or timeline risk to the base implementation. 	<p>Relationship Context & Preparation</p> <p>AI-assisted summaries surface recent interactions, event participation, and relationship history before outreach.</p>	<p>Engagement & Fundraising Focus</p> <p>AI-supported insights identify engagement patterns, lapsed relationships, and outreach opportunities.</p>
<p>Data Quality & Consistency</p> <p>AI-assisted monitoring flags potential duplicates, incomplete records, and data anomalies for staff review.</p>	<p>Executive Visibility & Reporting</p> <p>AI-assisted reporting enables faster access to campaign, engagement, and partnership performance insights.</p>	

CRM DATA FOUNDATION (Phase 1 Go-Live)

AI OPTIONAL

WHY [REDACTED] IS PREFERRED · GOVERNANCE & PROVEN EXPERIENCE

Industry AI Governance Leader

Recognized for AI & ML governance and risk management in regulated and public sector environments.

Dedicated AI Center of Excellence

Focused on responsible deployment, monitoring controls, and operating model definition.

Microsoft Azure AI Specialization

Certified Azure AI and ML capabilities with proven enterprise deployment and validation practices.

Defined AI Controls Model

All AI use governed by validation, monitoring, audit, and risk controls — not deployed without oversight.

AI supports people, not replaces them, and is introduced only where it strengthens execution, accountability, and decision making.

-Financial Proposal

#	Pricing Description	Year 1	Year 2	Year 3	Total (Year 1+ Year 2+ Year 3)
1.	Product license fees/recurring subscription costs	\$ 80,000	\$ 84,000	\$ 88,200	\$ 252,200
2.	One-time set-up, implementation & training fees	\$ 20,000	-	-	\$ 20,000

Inclusions as part of product license fees/recurring subscription costs

1. CRM

- a) Upto 2,500 annual enrollments
- b) Upto 30 user licenses for Florida Polytechnic University team
- c) Upto 3,000 calling minutes/month
- d) Upto 3,000 SMS/month

2. Student Application Portal

3. FloStack-Appointment/tour scheduling & Event Management (Upto 1,500 student enquiries/month)

Additional Details/Notes

- 1. Pricing for products or product suites outside the RFP scope will be discussed as requirements arise or in later stages of the RFP.
- 2. The recurring subscription fees will be billed annually, with an initial contract term of three (3) years.
- 3. A 5% annual escalator will be applied to the subscription fees.

Pricing Overview for Florida Polytechnic University Foundation



all-inclusive CRM, conversion service, and support service includes the following items:

Service	Description	Annual
Giving Platform Pro	<p>Embrace continuous, compounding fundraising growth by integrating unlimited automation and powerful fundraising tools. This unified platform approach empowers you to deepen donor relationships and achieve unprecedented impact—and savings.</p> <p>CRM - Up to 25,000 Records</p> <ul style="list-style-type: none"> • Unlimited users • Built-in email marketing tool • Nightly address updates and deceased status updates (via TrueGivers) • Mobile app with unlimited Mobile Video Acknowledgements • DonorSearch ProspectView Integration (Access to the public charitable giving history and wealth data of your contacts) • Unlimited Journey Automations (Automated cultivation sequences) • Penny (the intelligent fundraising partner that helps fundraisers see clearly, act confidently, and grow generosity) <p>Fundraising</p> <ul style="list-style-type: none"> • Donation Forms • Event Registration pages • Peer-to-Peer Fundraising • Auction Fundraising • Outbound Texting • Text-to-Donate <p>Support & Training</p> <ul style="list-style-type: none"> • Unlimited chat, email, and telephone support • Unlimited access to live and on-demand webinars via [Redacted] Learning • Daily group training sessions • Philanthropy Institute Course 	\$10,999.00
Advanced Coaching Package	<p>4 one-on-one private coaching sessions per year to help you strategize on growing your mission with [Redacted] tools.</p> <p><i>Example Coaching Topics Include:</i></p> <ul style="list-style-type: none"> • Database Clean Up • Maximizing Communication • Skills in Reporting • End of Year Fundraising 	\$1,500.00
<i>Total Recurring Fees:</i>		\$12,499.00
One Time Fees & Promotions		

Data Conversion	Smart Start Standard Data Conversion from [REDACTED]	\$2,000.00
Promotion	WAIVED Conversion with Signed Agreement by 6/30/26	(\$2,000.00)
	<i>Total One-Time Fees:</i>	\$0
	Total First Year Investment:	\$12,499.00

1. The pricing in this contract is valid for 30 days.
2. Total First Year Cost is due at signing.
3. If Database exceeds licensed record count, an overage charge will be invoiced at \$13.75 per 250 records. The invoice will be generated on a monthly basis in arrears for previous month's count.
4. All purchased coaching and/or consulting hours must be used within a 12-month period and will reset upon the beginning of a new 12-month period. These hours do not roll over.
5. All invoices may be subject to applicable sales tax. The customer will receive an exemption certificate request if the invoice is subject to sales tax.

Bundle Pricing: This proposal reflects special bundled pricing that requires all software components to remain under contract. If any component is cancelled or removed, the bundled discount will be lost, and the remaining software will revert to standard individual pricing, which may be higher than current bundled pricing.

Pricing Overview for Florida Polytechnic University Foundation

all-inclusive CRM, conversion service, and support service includes the following items:

Service	Description	Annual
Giving Platform Pro	<p>Embrace continuous, compounding fundraising growth by integrating unlimited automation and powerful fundraising tools. This unified platform approach empowers you to deepen donor relationships and achieve unprecedented impact—and savings.</p> <p>CRM - Up to 40,000 Records</p> <ul style="list-style-type: none"> • Unlimited users • Built-in email marketing tool • Nightly address updates and deceased status updates (via TrueGivers) • Mobile app with unlimited Mobile Video Acknowledgements • DonorSearch ProspectView Integration (Access to the public charitable giving history and wealth data of your contacts) • Unlimited Journey Automations (Automated cultivation sequences) • Penny (the intelligent fundraising partner that helps fundraisers see clearly, act confidently, and grow generosity) <p>Fundraising</p> <ul style="list-style-type: none"> • Donation Forms • Event Registration pages • Peer-to-Peer Fundraising • Auction Fundraising • Outbound Texting • Text-to-Donate <p>Support & Training</p> <ul style="list-style-type: none"> • Unlimited chat, email, and telephone support • Unlimited access to live and on-demand webinars via [REDACTED] Learning • Daily group training sessions • Philanthropy Institute Course 	\$12,499.00
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Payment processing built for nonprofits



Say goodbye to setup fees, support fees, and hidden merchant fees—keep more of your funds focused on your mission.

	Credit / Debit fee:	3.95% + \$0.30 per transaction
	PayPal fee:	1.95%**
	ACH fee:	1.95% + \$0.95 per transaction
	AMEX fee:	Add 1% per transaction
	Peer-to-Peer fee:	Add 1% per transaction

Amplify your nonprofit's impact with payment processing that makes it simple to accept donations and manage funds, so you can focus on nurturing donor relationships.



Raise donation conversion rates up to 55% with one-click payment options like PayPal, Venmo, Apple Pay, debit, credit, ACH, and in-person payments.



Feel confident in recurring donations with auto-updates for expired cards.



Process online donations that flow directly to your account seamlessly.



Stay protected with industry leading fraud monitoring and no chargebacks.

*When processing on 3rd party (non-preferred) payment processors, Fundraising platform processing fee is additional 1.95%

**Charged in addition to PayPal merchant fees