



Step 1 – Secure Your System

- ☐ Confirm at least two Solution Administrators are assigned
- ☐ Review roles and permissions (avoid shared logins)
- ☐ Remove inactive or outdated users
- ☐ Verify no former staff still have access
- ☐ Document who owns system administration today

Step 2 – Capture Institutional Knowledge

- ☐ Document key dashboards, reports, and exports
- ☐ Note where important workflows are
- ☐ Record naming conventions and *why they exist*
- ☐ Capture any custom fields, codes, or processes that matter
- ☐ Store documentation in a shared, accessible location (not a personal folder)

Step 3 – Train for Continuity

- ☐ Ensure at least two people are trained per role (when possible)
- ☐ Assign role-based Raiser's Edge NXT learning paths
- ☐ Bookmark the Raiser's Edge NXT Resource Center
- ☐ Treat training as ongoing, not just for new hires
- ☐ Identify gaps where only one person knows “how things work”

Step 4 – Pass the Torch

- ☐ Share the Reignite New User Mission page
- ☐ Set clear expectations for the first 30 days
- ☐ Highlight what *doesn't* need to be learned immediately
- ☐ Identify who they can go to with questions during the transition

Before You Consider This “Done”

- ☐ More than one person can access critical systems
- ☐ Key knowledge lives somewhere other than someone's head
- ☐ New staff have a clear, survivable starting point
- ☐ Your organization can handle change without losing momentum