RENXT Pre-Functional Configuration Survey

Introduction

Blackbaud Raiser's Edge NXT® is a powerful fundraising tool for your organization. Because of the impact donor data has on your institution, you want to make informed decisions as you implement this tool.

This workbook is designed to assist you in making important organizational decisions. When paired with the recommended training from Blackbaud University and a design session with your fundraising systems consultant, you will be able to better integrate, analyze, and communicate with your donors.

This survey serves as a tool for your Raiser's Edge NXT Project. This document will be used as a working document and toolset to help guide you through the various project phases of your implementation. This document is separate from your data conversion; it may be used to help inform testing processes and functional configuration elements, but it is not a guide for how your data will be converted.

Contents

Security

Define System Users and Assign Security

To prepare for this section, take advantage of the on-demand video Raiser's Edge NXT: Basics of Security.

For individuals with a Blackbaud Learn® subscription, there are two additional instructor-led trainings that provide more information: Raiser's Edge NXT: Basics of Data Health and Administration and Raiser's Edge: Effective Database Administration. They require completion of the Raiser's Edge NXT Fundamentals series and are a great way to broaden your database knowledge.

Security in Blackbaud Raiser's Edge NXT dictates how users interact with data. Depending on their day-to-day tasks, some users need more access than others. In Blackbaud Raiser's Edge NXT, security rights and privileges (the ability to add/edit/delete) are not assigned to individual users. Instead, privileges are assigned to Security Groups within the database. Each new user is placed within a group that shares a common characteristic. We recommend organizing security groups by job description (for example, Fundraiser). That way, users with similar needs are grouped together and new users are easily integrated into the system.

For web view navigation, Roles are assigned to each user within the Control Panel tab. Users maintain their Security Group assignment; Roles are add-on permissions. Roles do not necessarily mimic Security Groups. For example, one user within the Fundraiser Security Group may need access to Report Builder within web view. Another Fundraiser user does not work within Report Builder, therefore does not need to be assigned the Role related to that functionality.

In large organizations, there may be 10 or more Security Groups and Roles —depending on the needs of the users—with five or more users in a group. In smaller organizations, it is normal to have only a few Security Groups or groups featuring a single user.

Your Blackbaud Raiser's Edge NXT database includes default Security Groups that give you an idea of some sample configurations. You can keep, modify, or delete these user groups at any time to meet your organizational needs.

There are many types of permission options available in security settings. Some users need to run queries, generate acknowledgement letters, enter gifts, edit constituents, or add actions. For these types of users, you may wish to keep security rights and permissions open (so they can access exactly what they need to get their jobs done). Restrictive controls, however, are available to prevent certain groups from accessing sensitive areas of Blackbaud Raiser's Edge NXT.

Activity

List your users, their responsibilities, and the work they will need to do in Blackbaud Raiser's Edge NXT.

Name(s):	Responsibilities:	Tasks and features these users should be able to view/access:	Tasks and features these users should NOT be able to view/access:	Database view, web view, or both?

Activity

Based on your users' roles, create some labeled security groups:

| Security Group	Permissions
Example: "Fundraisers"	

Constituent Codes

Constituent codes both measure giving by constituency and define the relationship that you have with an individual or an organization. These codes reflect who the constituent is rather than their behavior.

Think of constituent codes in terms of a pie chart. They demonstrate the various constituencies in your database and their giving patterns as parts of the whole.

Gifts by constituent code

| Alumni | Board member | Corporation | Employee | Foundation | Individual | Parent | Volunteer |
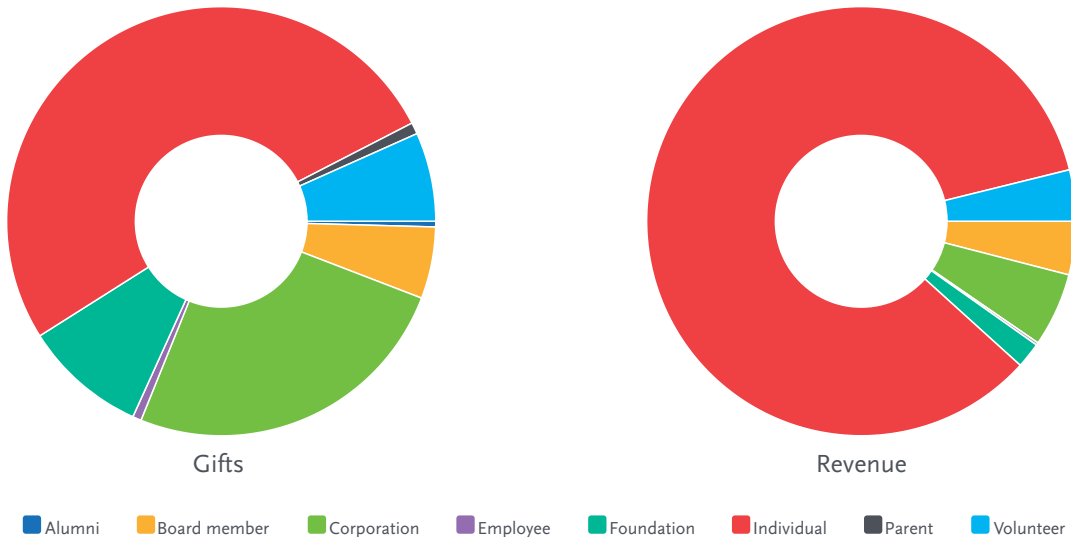
Constituent codes should not reflect behaviors such as giving, event attendance, exclusion from mailings, etc. These behaviors are tracked in other areas of the database and can skew reporting if tracked as constituent codes.

Avoid the common mistake of using constituent codes for "tagging" or "flagging." If the field is used in this way, you will be unable to report by constituency. Consider making those "tags" and "flags" Attributes, which we'll cover later in the workbook.

Recommended Training:

For those with a Blackbaud Learn® subscription, it is highly recommended to take the two Raiser's Edge NXT Fundamentals courses. The two courses and passing the Raiser's Edge NXT Certification Exam are required to take advanced training offerings.

The two Raiser's Edge NXT Fundamentals titles are:

1.   Raiser's Edge NXT: Fundamentals - Overview and Data Entry course and

2.   Raiser's Edge NXT: Fundamentals - Fundraising.

If time does not permit or if you have access to eLearning only, there are two brief eLearning courses titled Raiser's Edge NXT: Basics of Raiser's Edge NXT and Raiser's Edge NXT: Basics of Records.

Think about how you need to report. What slices of the pie matter most to you?

Constituent Code	Defin tion

Constituent Code Hierarchy

A constituent might have more than one code. For example, an individual might be a board member and a volunteer. When pulling a report to show board member giving, you need them to be included. When pulling a report to show volunteer giving, you need them to be included, as well. What if you are pulling a report to show all donors? You do not want to count their contributions twice. To avoid such an issue, we use a hierarchy of constituent codes.

ACTIVITY

Take your constituent codes and determine how you will want to organize them (especially if your constituents have more than one code). Try writing each constituent code on a small piece of paper and arranging them in a ranked column. Then, record the constituent code hierarchy you create here:

Order	Constituent Code
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	

TIP: The constituent code hierarchy should be documented in your Policies and Procedures. All users need to follow this hierarchy in order to maintain reporting standards. If you are concerned that the constituent codes may fall out of order, consider adding ordinal numbers to each code. This allows you to check the order within constituent records at any time.

Custom Fields

Constituent custom fields (termed attributes in the database) describe a record in more detail than the standard fields allow. It's a way to track data in Blackbaud Raiser's Edge NXT for information that may not already have a place elsewhere in the solution.

Once you know how to use custom fields, you can make informed decisions regarding how your organization may use them.

Below, you will find the types of data that custom fields can store as well as some guidelines to follow when using custom fields.

Constituent Custom Field (Attribute) Data Types	
Text	Allows free-form text data entry. This is the least restrictive data entry format. We recommend selecting text when other data types are not applicable. Be advised that text does not allow consistency, which may become difficult to report on later.
Number	Allows number values (ex: 4 instead of four)
Date	Allows dates containing a month, day, and year (MM/DD/YYYY)
Currency	Allows monetary values
Yes/No	Allows either "yes" or "no" values
Table	Allows values selected from a user-defined table
Constituent Name	Allows another constituent's name to be entered
Fuzzy Date	Allows dates containing just the month and year

When creating custom fields (attributes), you must also decide if the field will follow specific guidelines. For example, will the field be required on all constituent records? If so, the system requires that every record contain that custom field value before it can be saved.

Here are the guidelines you will use to make decisions related to each custom field:

Allow Only One Per Record	Allows the custom field (attribute) to be added once to each record. For example, you could limit an anniversary date to one instance per record.
Required	Requires the custom field to be entered on all new constituent records before the user can save the record.
Active	Enables the custom field to be used and assigned to a constituent record. Custom fields that are no longer in use can be deactivated by unchecking the "active" box. This will not remove information from Blackbaud Raiser's Edge NXT. It will, however, prevent users from adding the custom fi Id moving forward.

ACTIVITY

Define your custom fields (attributes) below.

Description	Data Type	Table Name (if applicable)	Allow Only One per Record?	Required?
Example: Interests	Table	Interests	N	N
Example: Anniversary	Date	N/A	N	N

TIP: Before creating a custom field (attribute), confirm whether this data point already exists in the database. For example, "birthday" should not be added as a custom field, since it is present on the constituent record.

TIP: Custom fields (attributes) are not only available for constituent records, but can be added for Gift records, Action records, Event participant records etc.

If any tables were designated on the previous page, please define the table entries:

Table Name from Attribute	Table Entries (List)
Example: Interests	Golf, Knitting, Equestrian

Addressees and Salutations

Every individual record in Blackbaud Raiser's Edge NXT has a Primary (default) Addressee and a Primary (default) Salutation, otherwise known as Name Formats. You will want to choose a default setting that you intend to use the most often. If you use other formats, you can set them as alternate addressees and salutations.

Addressees and salutations in Blackbaud Raiser's Edge NXT:

- Must be created as formulas (and will convert incorrectly as "blocks" if entered any other way)
- Are based upon fields on the constituent record
- If the required data is absent on the constituent record, the name format will appear incomplete

ACTIVITY
Identify which addressees and salutations you think you'd use most often with your constituents.

On a typical piece of constituent mail, what would the addressee be?

Primary Addressee: _____

On the inside of a typical constituent letter, what would the salutation look like?

Primary Salutation: _____

What might you send that would use an alternate addressee or salutation?

Examples: Donor Recognition, Formal Gala Invitations

_____   _____

_____   _____

_____   _____

What might you use as alternate addressees or salutations?

_____   _____

_____   _____

_____   _____

Consider this scenario: If your primary addressee is very formal and you want to invite your constituents to a barbeque, would you use formal language on the envelope?

Actions and Moves Management

Actions define important touchpoints—sometimes known as "quality contacts"—that you have with constituents. They show your work in moving relationships forward. Fundraisers spend more of their time working with donors performing Actions. Typically, we define Actions as part of the Moves Management cycle, as defined by four basic Action Types:

- Qualifi ation
- Cultivation
- Solicitation
- Stewardship

There are fi e pre-populated Action Categories:

- Phone Call
- Email
- Meeting
- Mailing
- Task/Other

ACTIVITY

Think about these Action Types and Categories and the users to whom they may apply.
Answer the questions below.

Which users will be solicitors/fundraisers?

_____

_____

_____

What metrics or goals do your fundraisers have (example: number of calls or meetings per month, quarter, etc.)?

_____

_____

_____

Do the action types above allow you to effectively track your goals? Why or why not?

_____

_____

_____

Gift Entry Process

To prepare for this section, please take the self-paced courses: Raiser's Edge: Basics of Gifts and Raiser's Edge NXT: Basics of Automated Recurring Gifts. As a best practice, organizations need to establish a specific policy on how/when gifts are entered/acknowledged.

Basics of Gift Batch Entry

Batch entry is the most popular option for entering gifts. If using batch in the database, batch templates allow for consistent, inclusive entry. You can also set projections for the total number of expected gifts and Blackbaud Raiser's Edge NXT will validate these numbers for accuracy. Using the gift batch method also leaves a distinct audit trail in case any questions about entries arise.

For those with a Blackbaud Learn® subscription, it is highly recommended to take Raiser's Edge NXT: Gift Batch and Automated Recurring Gifts. This course reviews utilizing batch in web view; passing the Raiser's Edge NXT Fundamentals NXT Exam is a prerequisite. For those working in the database, it is recommended to take the Raiser's Edge Fundamentals - Gifts course, which has no prerequisites.

ACTIVITY

Consider the volume of gifts you get throughout the year. Is there often ebb and flow? Use the table below to help you plan how gifts will be entered into your database. Don't forget to include times when your gift volume may be above average.

Month	Types of Gifts	Volume	Key Staff Responsible for Gift Entry
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Gift Acknowledgement

If you plan to acknowledge gifts using the mail module, we recommend that you take the Raiser's Edge: Effective Mail Communications class.

As you establish your gift entry policy and procedures, consider how you want to acknowledge your donors. You can acknowledge your gifts with a thank you letter that acts as an official receipt—which is most common—or you can send a separate receipt to the donor. Canadian clients must send a separate receipt to the donor.

Many organizations will have multiple versions of acknowledgement letters. For example, you could create an acknowledgement letter specific to a special event or direct mailing. To determine what letter will be printed for a gift, you will code each gift with a letter code.

ACTIVITY

Enter your list of different letters here as well as a brief description of the letter and its purpose.

Letter Name	Usage

Appeals, Funds, and Campaigns

Overview

A gift record in Blackbaud Raiser's Edge NXT features three key fields where you can enter gift coding information: Appeals, Funds, and Campaigns. Each of these fields is meant to track a different type of information so that, together, they can tell a complete story about a gift.

The importance of separating these fields cannot be overstated. To accurately report on giving, these three fields must be tracked as separate types of data.

Existing Appeals, Funds, and Campaigns will convert into Blackbaud Raiser's Edge NXT as-is unless a change is identified during the conversion testing phase. Your conversion analyst will make an educated decision about where to map your existing data. If you have feedback on this mapping, please notify your conversion analyst.

When considering the structure of Appeals, Funds, and Campaigns, it is often easiest to think of them from the bottom up.

Appeals

The Appeals field in Blackbaud Raiser's Edge NXT is meant to track the answer to the question "How did we get this donation?" These are typically your solicitations, and should encompass every way you bring in donations. For example, you may have seasonal direct mail appeals, a monthly e-blast, and grants. All of those are appeals. Because most organizations repeat solicitations seasonally, we recommend you analyze appeals year-over-year.

TIP: Don't forget to include "unsolicited" as an appeal if you receive unsolicited donations!

The Appeals field in Blackbaud Raiser's Edge NXT allows you to track more than just the name and description of an appeal. It includes many other optional fields. For example, if you send out 30 direct mail appeals every year, you may consider grouping them into the category "direct mail." If you do not send out many appeals, you may not need to use these categories.

ACTIVITY

Do you already track appeals in your legacy database? _____

If yes, what is this field called? _____

Please list out your appeals—all the ways you solicit donations.

Appeal ID (abbreviation)	Appeal Description	Category (if applicable)	Overall Goal
Ex: FY2020 Gala	FY2020 Hope Comes Alive Gala	Events	$450,000
Ex: FY2020 DM Spring	FY2020 Spring direct mailing	Direct mail	$14,500
Ex: FY2020 Grants	FY2020 grants	N/A	$1,200,000
Ex: FY2020 EM Jan	FY2020 January e-blast	e-blasts	$4,000

TIP: Adding a goal to your appeals allows for real-time measurement in the Blackbaud Raiser's Edge NXT web view.

Funds

The Fund field in Blackbaud Raiser's Edge NXT is meant to track the answer to the question "What is this donation for?" This field typically encompasses your general operating fund, programs, and restrictions. This field almost always correlates to your organization's general ledger.

ACTIVITY:

Please answer the following questions:

Do you already track this in your legacy database? _____

If yes, what is this field called? _____

Enter your funds below. If your finance department likes to use numeric codes for funds, put those in the Fund ID field. The narrative can go in the Fund Description field.

Fund ID	Fund Description	Category (if applicable)
Ex: 3500	General operating	N/A
Ex: 6501	Edward Flanders Scholarship	Scholarships
Ex: 7083	Baseball	Athletics
Ex: 7000	General athletics	Athletics

Campaigns

The Campaign field in Blackbaud Raiser's Edge NXT is meant to track the overall fundraising goal. Think of these as umbrellas under which contributions are compiled for reporting. These are annualized (because fundraising goals are annualized).

It is normal for organizations that have an annual fundraising goal to have only one campaign per year: the annual campaign. All gifts flow upward into the annual campaign (the total fundraising for the year). Sometimes, organizations have concurrent fundraising goals that are separate from the annual campaign, such as capital campaigns, endowment campaigns, or special project campaigns. These are separate because the gifts received for them cannot be commingled with gifts to the annual campaign.

ACTIVITY:

Please answer the following questions:

Do you have an overall annual fundraising goal? _____

Do you already track this in your legacy database? _____

If yes, what is this field called? _____

Campaign ID	Campaign Description	Category (if applicable)

Events

Events functionality is included in your Raiser's Edge NXT software solution. This module provides the ability to manage Events, Event Participants and Online Event Registration Forms. Details include the event location, event fees, the list of participants (host and guest) information and other participant details.

Recommended Training: Blackbaud Raiser's Edge NXT: Events
Pre-requisite: Blackbaud Raiser's Edge NXT Fundamentals Exam

ACTIVITY:
Please answer the following questions:

Please provide an overview of your organization's events, including names and types of events.

_____

_____

What is the average total number of events that you hold per year, including virtual?

_____

What are examples of prices (registration fees) associated with your events?

_____

_____

Will any part of the event fee be considered a gift (tax deductible)?

_____

_____

Will you need to track volunteer assignments as a part of events?

_____

_____

Please list and explain any other details that you need to track for events and/or event participants.

_____

_____

Do you currently have, or are you interested in, online registration forms for events?

_____

_____

Please describe event-related reporting needs.

_____

_____

Search (Prospect

The Search Module, otherwise known as Prospect Management Functionality, is included in your Raiser's Edge NXT software solution. The Search Module provides data fields within the solution to track details about a constituent, such as prospecting details, giving potential, and targeted asks, that may lead to cultivation and stewardship opportunities.

<u>Recommended Training:</u> Blackbaud Raiser's Edge NXT: Prospect Management
Pre-requisite: Blackbaud Raiser's Edge NXT Fundamentals Exam

ACTIVITY:

Please answer the following questions:

Does your organization have a formal moves management process through which donors are cultivated? Please explain.

_____

_____

Does your organization use any kind of internal ratings system to prioritize your donors? Please explain.

_____

_____

Please describe the prospect research information you wish to track, e.g., Financial Data, Interests. Are your solicitors staff, volunteers or both? How many solicitors do you have? What is your solicitation process?

_____

_____

Do solicitors submit contact reports after meeting with prospects? How frequently?

_____

_____

Do you evaluate solicitor effectiveness? If so, how?

_____

_____

Do you need to track the foundation/corporate/government proposal or grant application process?

_____

_____

How do you currently track large solicitations?

_____

_____

Please describe your regular prospect management and solicitation tracking reporting needs.

_____

_____

Conclusion

Congratulations on completing this workbook! Please send it to your consultant or project manager.

Preparing for Your Design Session

If you have not already, schedule a design session with your consultant. In this session, you should expect to review the answers in this workbook and consider how they impact the structure of your database. You will engage in a discussion with your consultant about your needs and requirements. You may even change your mind about some of the things you entered in this workbook (and that is OK)!

Be ready to take notes during your design session. You will be making many important decisions about the structure of your data and functionality of your database. After the session, you may be asked to update your workbook and send the updated copy to your consultant.

When you go live in Blackbaud Raiser's Edge NXT, you will use your workbook (and the decisions you have already made) as a guide. You will have the opportunity to enter new codes, organize users, and more. You have made some important decisions for your organization—now it's time to put them into action!