



Raiser's Edge NXT Donor Database
November 10, 2020
Including a new FAQ section



Futures in Education
FOR BROOKLYN AND QUEENS
Changing Lives Through The Gift Of Education

Workshop Contents

- What is Raiser's Edge NXT?
- Importance of a donor database
- What to input
- User access roles
- Requesting access
- Constituents lists
- Constituent record
 - View, add or edit
- Gifts lists
- Gift record
 - View, add or edit
- Notes about your database

What is Raiser's Edge NXT?

- Raiser's Edge is an **online fundraising tool and donor database** that is available to every Brooklyn and Queens school/academy through Futures in Education.
- It can be used to **track important donor data**, including contact information, giving history, prospect research and more.
- Fundraising efforts may be targeted by **sorting and filtering donors into groups and lists**.
- Your school/academy has **access to run pre-built reports, as well as the ability to generate your own** custom reports.

Why is it important that your Academy use a Donor Database?

- Collecting donor information on **index cards, spreadsheets, written lists, etc., is not secure** and leads to the loss of valuable donor data. Raiser's Edge is accessed only through **secure online login, and the information is constantly backed up** in case of emergency.
- By utilizing **donor contact information, gift history and wealth screening data** within Raiser's Edge, your academy will be able to approach fundraising and development strategically with **targeted donor lists**.
- Any gifts through the **CAP mailings or the school donation page** maintained by Futures in Education has **been kept up to date within Raiser's Edge** by Futures.

Raiser's Edge: What to Input?

Who should be entered in Raiser's Edge?

- Past and present donors - any lists kept outside of Raiser's Edge (spreadsheets, written lists, etc.)
- Any supporters who should be included in mailings, email blasts and other correspondence
- Participants of networking events (open house, other celebrations of the school), alumni reunions
- Non-parent supporters of school events, raffles, etc.

Who shouldn't be entered?

- Current parents

What information should be entered?

- Name, spouse's name, maiden name, gender, address, phone number, email
- The relationship of the constituent to the academy
- Donor outreach details like who made contact, when and how
- Past and present gifts

What information shouldn't be entered?

- Ticket fees, raffle sales

Academy Roles within Raiser's Edge

| Board | Principal | Development | Administrator |
|---|--|---|---|
| Board chair or member | Principal or Assistant Principal | Individual on the board or staff designated to work on development | Staff or volunteer who is assigned to make database updates |
| Focus should be on reviewing donor lists and reports | Utilize for alumni engagement, reviewing lists and report | Utilize the data for alumni engagement, analysis of giving | Enter new gifts and constituents into database |
| Information from the database can help with development plans and donor outreach. | Oversee the work of the administrator if that individual is part of the school staff | Work with the database as the primary repository for donor activity – gifts, meetings, interactions, events, etc. | Role can be filled by the development contact if that individual is regularly at school to record gifts |

Raiser's Edge: Requesting Access

Board Chair or Principal Sends Email to cap@futuresineducation.org

- What to include for *each* user:
 - Role (Principal, Board Development, Administrator)
 - Individual's Name
 - Individual's Email Address
 - Individual's Phone Number
- Look for email invitation to NXT
- Follow steps to complete access registration
 - You **MUST** use the same email address provided
- Appointment may be set with Futures staff if there is any difficulty in getting set up

Raiser's Edge: Home Screen

Easiest way to see your data/get started

The screenshot shows the Raiser's Edge Home Screen. The top navigation bar includes 'Raiser's Edge NXT', 'Home', 'Fundraising', and 'Lists'. A search bar is labeled 'Search by Name'. A red arrow points from the 'Fundraising' menu to the 'Constituents' option in the 'Lists' dropdown. Another red arrow points from the 'Constituents' option to the 'Recently accessed' section in the 'Tasks' panel. A third red arrow points from the 'Recently accessed' section to the text 'Records you previously viewed'. A fourth red arrow points from the search bar to the text 'Ignore DB View!'. The 'Updates' section on the left contains several news items with dates and titles. The 'Tasks' section on the right includes 'Add constituent' and 'Add gift' buttons, and a 'Recently accessed' list with names like Donald F. Simone, John Test2, John Test, Philip J. Murphy, and Mahir H. Abdeldaim.

Updates **Where you manage actions**

What's new - 11/3/2020
[Learn what's new this week](#)

Customer success - 11/3/2020
[Check out the upcoming November webinars offered by Customer Success](#)

What's recent - 10/27/2020
[Check out the features from October 27th](#)

What's recent - 10/20/2020
[See the features from October 20th](#)

SKY Developer - 10/16/2020
[New Power Query and Power BI connector](#)

Tasks

- + Add constituent
- + Add gift

Records you previously viewed

Recently accessed

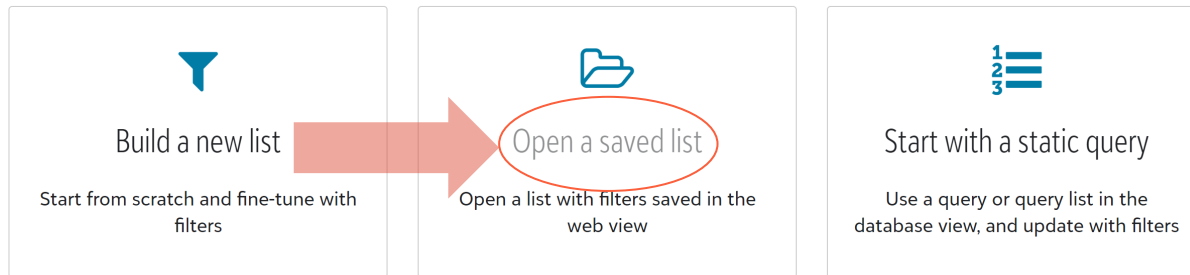
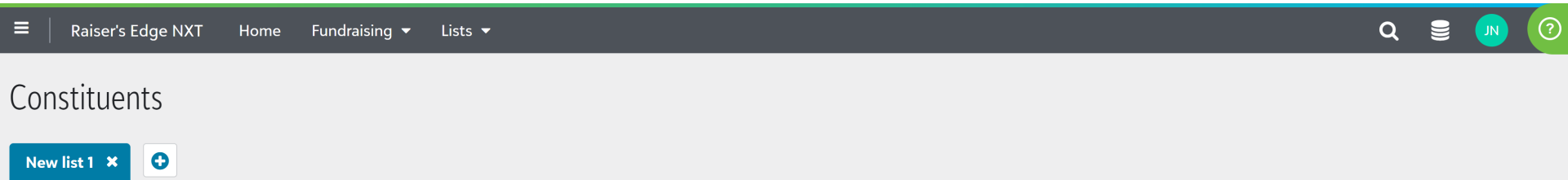
| | |
|------------------|--------------------|
| Donald F. Simone | Philip J. Murphy |
| John Test2 | Mahir H. Abdeldaim |
| John Test | |

Ignore DB View!

Raiser's Edge: Constituents Lists

Click on 'Open a saved list' to access canned lists made for the schools

Build a new list and start with a static query are advanced features



Raiser's Edge: Constituents Lists

Three available lists created for the schools

The screenshot shows the 'Open list' dialog box in the Raiser's Edge NXT interface. The dialog has a search bar labeled 'Find a list' and a checkbox for 'Only my lists'. Three lists are displayed:

| List Name | Record Count | Description | Last Edited |
|--------------------------------|----------------|--|--------------------------|
| Active Donors by School | 9,381 records | Donors currently active in the database | John Notaro on 11/5/2020 |
| Active Records by School | 238.7k records | All active records with school constituency code, excluding inactive, deceased, do not mail | John Notaro on 11/8/2020 |
| All Database Records by School | 266.9k records | All records in the database, including inactive, deceased and do not mail. NOT FOR MAILING/OUTREACH PURPOSES | John Notaro on 11/5/2020 |

At the bottom of the dialog are 'Open' and 'Cancel' buttons.

Active donors – have given at least one gift that has been recorded

Active records – individuals in the database – givers and non-givers

Important: All records list – do not try to use to do a mailing – there are inactive records included

Raiser's Edge: Constituents Lists

'Active records by school' list – things to know

- The list may take a few minutes to load originally
- It is sorted largest to smallest by lifetime giving
- Every column is sortable and width is adjustable
- In this view, the records are sorted by grad year (records with no grad year will show first)
- Lifetime giving – to the CAP program
- Donor type – alumni, friend, parent, etc.
- 2020 Prospect Tier – potential major gift prospect
- Assigned actions will show in the last two columns
- **For an Excel file, click Export! (the whole list takes several minutes)**

2,950 Constituents List updated 8 minutes ago

Share **Export** Add/Exclude Find in this list

Filter: Constituent codes: 1 set selected Solicit codes: Exclude Do Not Mail

adjust *sorted*

| | Constituent summary | Constituent ID | Lifetime giving | Latest gift | Greatest gift | Donor Type | Graduating Grammar School | Elementary Graduation Year | 2020 Prospect Tier | 2020 Planned Giving Prospect | Last action | Next action |
|----|-----------------------------------|----------------|-----------------|------------------------------------|------------------------------------|------------|---------------------------|----------------------------|---------------------|------------------------------|-------------|--------------|
| MB | Name Address Phone Email | C-228605 | \$0 | | | | Holy Family School | | Tier 5 8/21/2020 | | None | None planned |
| GG | Name Address Phone Email | C-185949 | \$40 | \$10 one-time gift 9/25/2014 | \$10 one-time gift 9/25/2014 | Alumni | Holy Family School | 1956 | Tier 4 8/21/2020 | | None | None planned |
| LC | Name Address Phone Email | C-182505 | \$0 | | | Alumni | Holy Family School | 1957 | | | None | None |

Export complete. Download file. Export processing

Raiser's Edge: Constituents Lists

All data points are clickable! Click on the constituent name to see his/her record.

Constituents

Active Records by School × +

2 Constituents List updated 2 minutes ago

Share Export Add/Exclude × Q □ ⌵

Filter: Constituent codes: 1 set selected × Solicit codes: Exclude Do Not Mail ×

| ... | Constituent summary | Constituent ID | Lifetime giving | Latest gift | Greatest gift | Donor Type | Graduating School |
|------------------|-------------------------|----------------|-----------------|-------------|---------------|------------|-------------------|
| ... | John Test | 192099 | \$0 | | | Alumni | Holy Famil |
| ... | John Test2 | 192323 | \$0 | | | | |

Map view

3. Click View record

2. Click on name

Search Tips

Raiser's Edge: Constituent Record

Collapse all when starting in order to see all available fields

Raiser's Edge NXT Home Fundraising Lists

John Test
Add summary note

Constituent codes
CAP-Holy Family CA

Edit Mark as... Collapse all

| | |
|-----------------------------------|--|
| Constituent summary Expand | Contact information <input checked="" type="checkbox"/> Check mark indicates populated data |
| Notes 0 | Timeline |
| Actions 0 | Giving \$0 |
| Relationships 0 | Giving history 0 |
| Assigned fundraisers | Peer-to-peer fundraising |
| Solicit codes 0 | Tags 1 Greater than zero indicates populated data |

Raiser's Edge: Constituent Record

Important sections of the record

Constituent summary

Edit ▾

Primary name formats

Addressee Mr. John Test
Salutation Mr. Test

Personal info

Gender Unknown
Date of birth None found
Age None found
Marital status None found
Constituent ID 192099

[View constituent properties](#)

Contact information

Edit ▾

Include inactive

Addresses [View details](#)
Home ★

Phone numbers
No phone numbers found

Email addresses
No email addresses found

Online presence
No online presence found

Custom fields

+ Add

Sort ▾

Any category ▾

| | |
|------------------------------|--------------------|
| ⋮ Donor Type | Alumni |
| ⋮ Elementary Graduation Year | 1990 |
| ⋮ Graduating Grammar School | Holy Family School |

Giving history

+ Add gift

Raiser's Edge: Constituent Record

Add a record



Before you add a record into the database, double and triple check that the record does not already exist!

Open the 'All Records' constituents list – search by name, even check address

You do not want to create duplicate records in the database!

If you are adding more than 25 records or if you are unsure of how to proceed, please email cap@futuresineducation.org and provide a spreadsheet with your updates.

Include all in separate columns: First name, Last Name, Mailing/Emailing Information (Address, City, State, Zip, Email), Graduating Grammar School and Year, Donor Type and any other field you would like to add.)

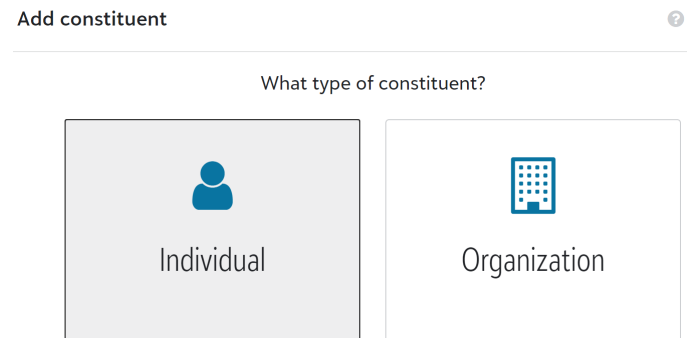
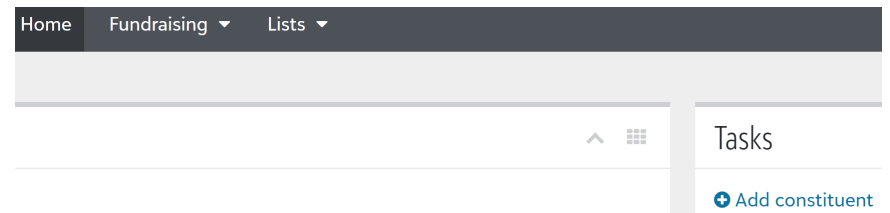
Raiser's Edge: Constituent Record

Add a record

Check to see if record already exists (see prior page)

Go to home page and click 'add a constituent'

Select 'individual'



Raiser's Edge: Constituent Record

Add a record

Fill in as much information as possible!

Bare minimum must be:

- Title
- First Name
- Last Name
- Address (see next pages)
- Constituent code (see next pages)
- Addressee (see next pages)
- Salutation (see next pages)
- Custom fields (see next pages)

Click Save

If a potential duplicate exists, the system will warn you; please check before saving!

Add individual

Title

First name Middle name Last name *

Suffix

Preferred name Former name

Gender Date of birth

Address
[+ Add address](#)

Constituent codes
[+ Add a constituent code](#)

Primary name formats

Addressee Custom

Salutation Custom

[Save](#) [Cancel](#)

Raiser's Edge: Constituent Record

Add a record

Address

For type, select 'home'

Keep default set to primary

Start typing in your address and a dropdown will appear with valid U.S. mailing addresses

Click 'done'

Constituent code

Click the dropdown

Select your school (should be only option)

Click 'done'

Addressee/Salutation

Addressee: Select : Title 1, Spouse Title, First Name, Middle Initial, Last Name

Salutation: Select: Title 1, Spouse Title 1, Last Name

Address

Type *

Valid from

Address *

Valid to

Search for an address

Enter address without search

Primary

Do not mail

This address is seasonal

Done Cancel

Constituent codes

Constituent code *

Start date

End date

Done Cancel

Addressee (OK that is shows 'and')

Mr. and John Test,
[Title 1] and [Spouse Title 1] [First Name] [Middle Name Initial] [Last Name], [

Salutation

Mr. Test
[Title 1] and [Spouse Title 1] [Last Name]

Raiser's Edge: Constituent Record

Add a record

Custom Fields

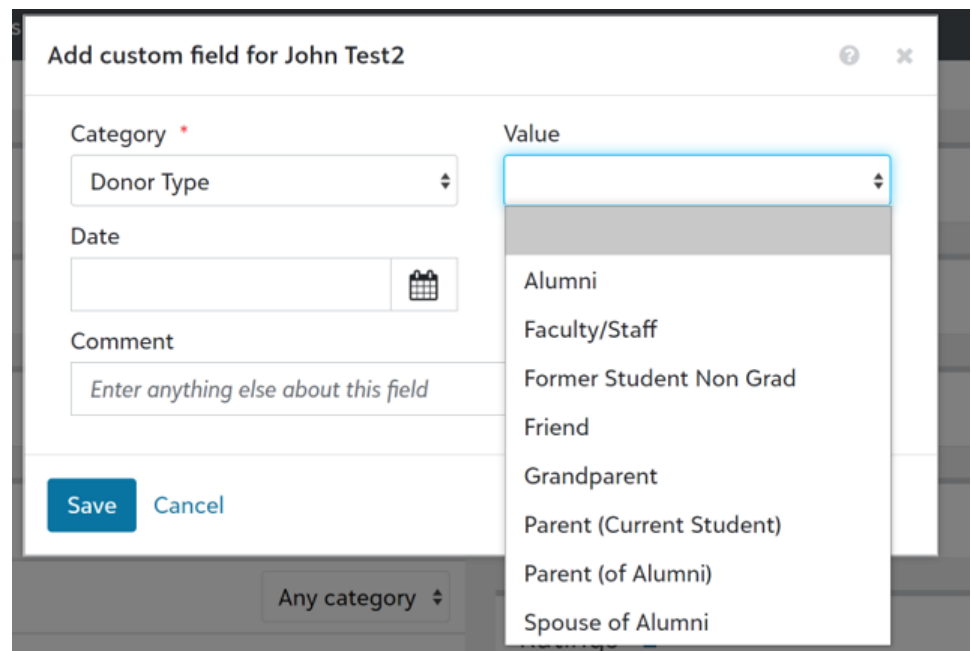
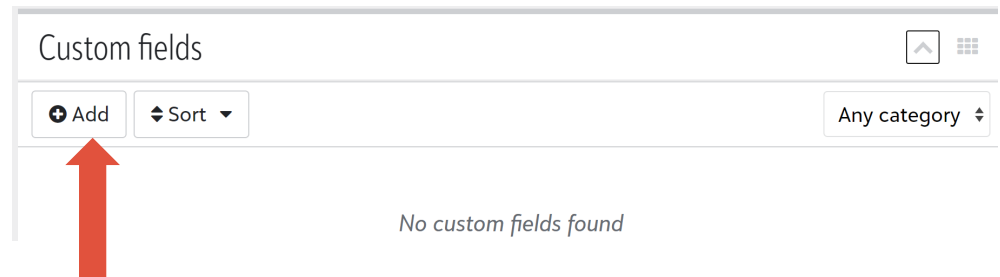
AFTER record is created, click into it and go to custom fields section

Click 'add'

Donor Type

Choose 'Donor Type' from the 'Category' drop down

Choose the option that best fits the constituent you are adding. If you are unsure of the type, just select 'Friend'



Raiser's Edge: Constituent Record

Add a record

Custom Fields

Graduating Grammar School

If you are adding an alumnus/a record, enter the EXACT name of the school at the time of that individual's graduation. (example: 'school' not 'academy')

Add custom field for John Test2

Category *
Graduating Grammar School

Value
ABC School

Date

Comment
Enter anything else about this field

Save Cancel

Elementary Graduation Year

If you are adding an alumnus/a record, enter the date that individual graduated 8th grade.

Add custom field for John Test2

Category *
Elementary Graduation Year

Value
1990

Date

Comment
Enter anything else about this field

Save Cancel

Raiser's Edge: Constituent Record

Edit a Record

There are restrictions on what can be edited on a local level to ensure the quality of the database. There is no access to delete – this is rarely an option for good database management.

If you are editing/adding more than 25 records or if you are unsure of how to proceed, please email cap@futuresineducation.org and provide a spreadsheet with your updates. For existing records, you must include the constituent id in order for us to make any changes.

Three edit options: 1. Edit name, 2. Mark as inactive, deceased or anonymous, 3. Edit address/phone number/email



John Test2
[Add summary note](#)

Constituent codes
CAP-Holy Family CA

1. Edit Name 2. Mark inactive, etc.

Constituent summary

Primary name formats
Addressee Mr. John Test2
Salutation Mr. Test2

Personal info
Gender Unknown
Date of birth None found
Age None found
Marital status None found
Constituent ID 192323

Contact information

 3. Edit address/phone/email Include inactive

Addresses [View details](#)
Home ★
123 Main Street

Phone numbers
No phone numbers found

Email addresses
No email addresses found

Online presence
No online presence found

Raiser's Edge: Constituent Record

Edit a Record

Edit Address

It is important to store the historical information of address changes. When editing an address, you will keep the old address on record and add a new address.

Click 'edit address'

Click the 'mark as do not mail icon' (circled to the right)

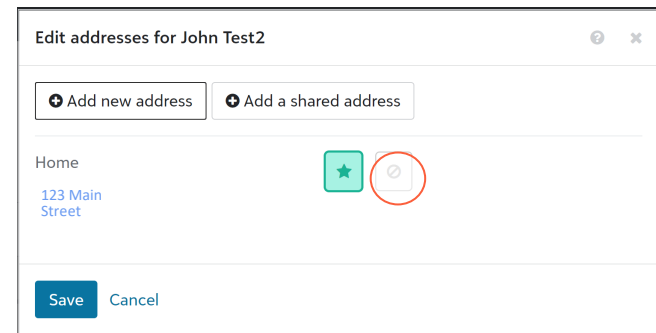
Then click 'add new address'

Select the 'address type' and enter in the new/correct address

Select the address as 'primary' (circled to the right)

Click 'Done'

Click 'Save'

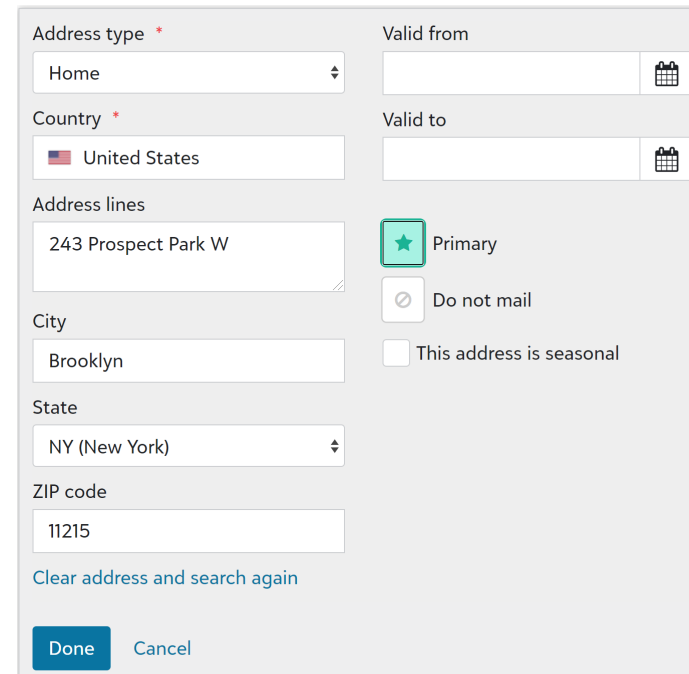


Edit addresses for John Test2

+ Add new address + Add a shared address

Home
123 Main Street

Save Cancel



Address type *
Home

Country *
United States

Address lines
243 Prospect Park W

City
Brooklyn

State
NY (New York)

ZIP code
11215

Valid from

Valid to

Primary
 Do not mail
 This address is seasonal

Clear address and search again

Done Cancel

Save Cancel

Raiser's Edge: Constituent Record

Edit a Record

Edit Email or Phone

It is better to add a new email or phone number and inactivate the old one when making an update.

You have access to edit or add.

Primary – For each record, there should be one primary phone number and one primary email address

Do not contact – Click this icon when a donor has indicated that he/she should not be called/emailed

Inactive – Click this icon to inactivate a phone number or email that is no longer valid

Click 'Save' when finished

The screenshot shows a window titled "Edit email addresses for John Test". At the top right are help and close icons. Below the title bar is a button labeled "+ Add email address". Underneath is a header with the text "Primary | No Contact | Inactive" and an "Edit" link. The main content area shows an email address "Email abc@123.com" with four icons: a green star (Primary), a grey circle with a slash (No Contact), a grey triangle with an exclamation mark (Inactive), and a grey pencil (Edit). At the bottom are "Save" and "Cancel" buttons.

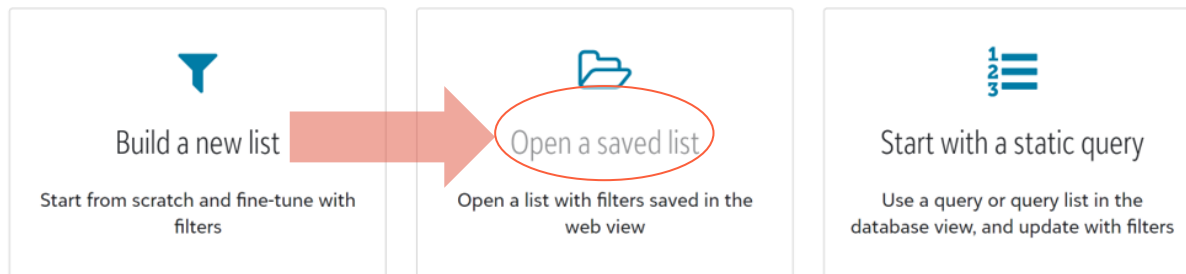
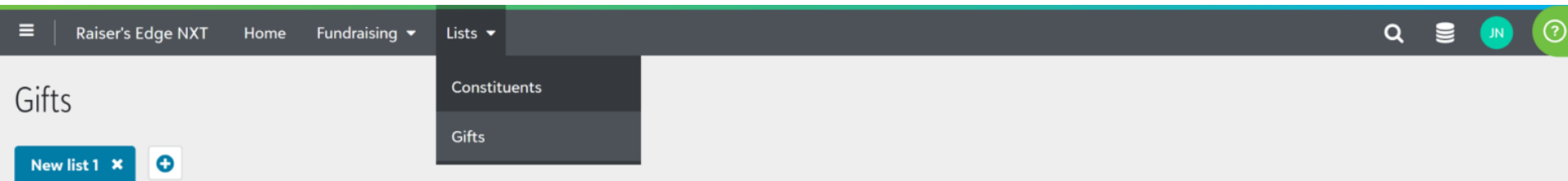
The screenshot shows a window titled "Edit phone numbers for John Test". At the top right are help and close icons. Below the title bar is a button labeled "+ Add phone number". Underneath is a header with the text "Primary | No Contact | Inactive" and an "Edit" link. The main content area shows a phone number "Home (718) 888-8888" with four icons: a green star (Primary), a grey circle with a slash (No Contact), a grey triangle with an exclamation mark (Inactive), and a grey pencil (Edit). At the bottom are "Save" and "Cancel" buttons.

Raiser's Edge: Gifts Lists

Go to Lists – Gifts

Click on 'Open a saved list' to access canned lists made for the schools

Build a new list and start with a static query are advanced features



Raiser's Edge: Gifts Lists

Type in CAP to see the lists available to the schools
(See Constituents Lists section for information on how to use lists, do exports, etc.)

Open list



cap



Only my lists

CAP - All Gifts

279 records

Description: Listing of all gifts received for your school/academy.

Last edited by on 11/9/2017

CAP - Check Donations Last Month

226 records

Last edited by Peter Fifield on 12/14/2018

CAP - Credit Card/Direct Debit Last Month

13 records

Last edited by Peter Fifield on 2/11/2019

CAP - Donations Made Online

288 records

Last edited by John Notaro on 11/6/2020

CAP - Gifts Directly to School/Academy Last Month

2 records

Last edited by John Notaro on 2/11/2018

CAP Gifts \$500+ Last Week

9 records

Last edited by Peter Fifield on 1/3/2020

Open

Cancel

Raiser's Edge: Gifts Lists

'CAP All Gifts' list – things to know

- Shows all gifts made to your school since the database was started
- List is sorted so most recent gifts appear on top
- Click on the gift amount to see further details
- Make use of the filter to change date and other gift parameters
- Note that most likely the only gifts in the database right now are those that were entered by Futures in Education through responses to the alumni mailing

List View - for privacy, names and amounts whited-out

Gifts

CAP - All Gifts +

505 Gifts *List updated 12 minutes ago*

Share Export Find in this list Filter

Filter: Campaign: Catholic Alumni Partnership ×

| Constituent | Date | Amount | Fund | Appeal |
|-----------------------|-------------|-------------------------|------------------------|------------------------|
| Names | 11/4/2020 | Amounts | Holy Family Catholi... | 2020 Fall CAP Maili... |
| | 10/28/20... | | Holy Family Catholi... | 2020 Fall CAP Maili... |
| | 10/28/20... | | Holy Family Catholi... | 2020 Fall CAP Maili... |
| | 10/28/20... | | Holy Family Catholi... | 2020 Fall CAP Maili... |
| Justin R. Greia | 10/28/20... | | Holy Family Catholi... | CAP Web Donations |

Filter options

Filters ? ×

Gift basics

Campaigns, funds & appeals

Gift types

Acknowledgements & receipts

Custom fields

Gift amount

Greater than or equal to

Gift date

At any time

Post status

At any time

Posted

Not posted

Do not post

Credited to

Fundraiser

Gift constituency

Apply filters Clear all filters Cancel

Raiser's Edge: Gift Record

Add a gift



Giving credit to the right donor is critical! Do not use the 'add a gift' option. First go into the constituent record to make sure you are choosing the right person.

Check the 'what to input' page of this workshop for guidance on which gifts you would consider entering into the database. When in doubt, add it in. Gift history helps future fundraising efforts!

You do not want to create duplicate gift records in the database! Check gift history before entering!

You cannot edit or delete gifts – send an email to cap@futuresineducation.org if you need to make a change.

Raiser's Edge: Gift Record

Add a gift

Go to the constituent record first

Do not use the 'add a gift' function on the home page

Go to 'giving history' section of the constituent record

Click 'add gift'

The screenshot shows the constituent record for John Test. At the top left is a profile picture with the initials 'JT' and the name 'John Test'. Below the name is a link to 'Add summary note'. Below this are two dropdown menus: 'Edit' and 'Mark as...'. The main content area is a grid of tabs. The 'Giving history' tab is selected and highlighted. Within the 'Giving history' tab, there is a button labeled 'Add gift' which is circled in red. Below the button, the columns 'Date' and 'Amount' are visible.

| Date | Amount |
|------|--------|
|------|--------|

Raiser's Edge: Gift Record

Add a gift

Amount – Enter exact gift amount

Gift Date – Date the gift was received

Gift type – Keep default of one-time gift

Gift subtype – You can keep blank

Payment method – Choose how the gift was made (case, check, credit, etc.)

Appeal – Type 'cap' to see available appeals. Most gifts you will enter, will be: **CAP Direct to School**

Campaign – By selecting that appeal, 'Catholic Alumni Partnership' will auto-populate

Package – leave blank

Fund – type in the exact name of the school to select from dropdown

Skip *Split this gift*, *add a soft credit*, *acknowledgment* and *receipt* for now.

Post status – Update to 'do not post'

Comment – Use for any special designation

Click 'Save'

| | | |
|--|---|--|
| Amount * | Gift date * | <input type="checkbox"/> Mark as anonymous |
| <input type="text" value="\$0.00"/> | <input type="text" value="11/09/2020"/> | |
| Receipt amount: \$0.00 | Change receipt amount | |
| Gift type * | Gift subtype | |
| <input type="text" value="One-time gift"/> | <input type="text"/> | |
| Payment method * | | |
| <input type="text" value="Cash"/> | | |
| Gift splits | | |
| Appeal | Package | |
| <input type="text" value="Search for an appeal"/> | <input type="text" value="Search for a package"/> | |
| Campaign | Fund * | |
| <input type="text" value="Search for a campaign"/> | <input type="text" value="Search for a fund"/> | |
| Split this gift | | |
| Soft credits | | |
| + Add a soft credit | | |
| Acknowledgement status | Acknowledgement letter | |
| <input type="text" value="Needs acknowledgement"/> | <input type="text"/> | |
| Receipt status | | |
| <input type="text" value="Needs receipt"/> | | |
| Post status | Post date * | |
| <input type="text" value="Post to ledger"/> | <input type="text" value="11/09/2020"/> | |
| Comment | | |
| <input type="text"/> | | |

Notes about your Database

- The data is only as good as what has been entered
 - Schools that originally started in the CAP program and even those that joined later, provided 8th grader attendance records that were converted to digital records.
 - In some cases, incomplete data was provided, which may mean missing names, graduation years, etc.
- All records were run through a public search to find current address information
 - These searches have a 40% to 50% accuracy – more work is needed to be done locally to find updated information
 - Records where there is a processed gift have a higher likelihood of being current
- This past year, 2020, all records were run through a wealth screening.
- The Futures in Education staff can schedule time with you to come up with a plan to clean up your database, understand it and continue to make it more useful.
- Email cap@futuresineducation.org (most schools) or schoolsupport@futuresineducation.org (model schools)



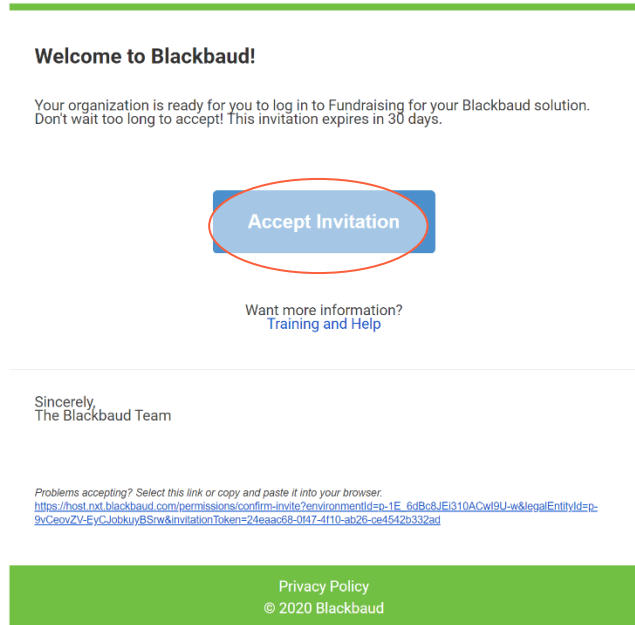
HOW TO LOGIN INSTRUCTIONS

Raiser's Edge: How to Log In

Logging in the First Time

After submitting a request for access (see prior pages of this document), you will receive an email invitation to join Blackbaud.

Click 'Accept Invitation'



Raiser's Edge: How to Log In

Logging in the First Time

When you accept the invitation in your email, it will bring you to the login page.

Click **'Sign Up'** to create a Blackbaud ID. This must be done the first time you are logging in.

If you had previously set up a Blackbaud ID, you will receive a warning message. In this case, simply click **'Forgot password'** and follow the instructions.

Only if login already exists

Blackbaud ID

Sign in to continue to Raiser's Edge NXT

Blackbaud ID


email address e.g. name@domain.org

Password

[Forgot password?](#) Remember my email

Sign in

or

 Sign in with Google

Need an account? [Sign up](#)

[Need help? Can't find your product sign-in?](#)

You must sign up the first time!

Raiser's Edge: How to Log In

Logging in the First Time

After you click 'Sign Up', you are taken to a new page to create your Blackbaud ID. You **MUST** use the email that you provided in your original request and where the email invitation was sent!

Click '**Sign Up**' and an email will be sent to you to verify your email address. **You only have 24 hours to complete this step. Please do it immediately!**

Create a Blackbaud ID

This will be your Blackbaud ID

Password

- Requires 8 characters or more,
- including 3 of the following:
 - Capital letter
 - Lowercase letter
 - Number
 - Special character (!, #, %, etc.)

Confirm password

First name

Last name

By continuing below, you are agreeing to the Blackbaud, Inc. [Terms of Use](#) and [Privacy Policy](#).

Sign up

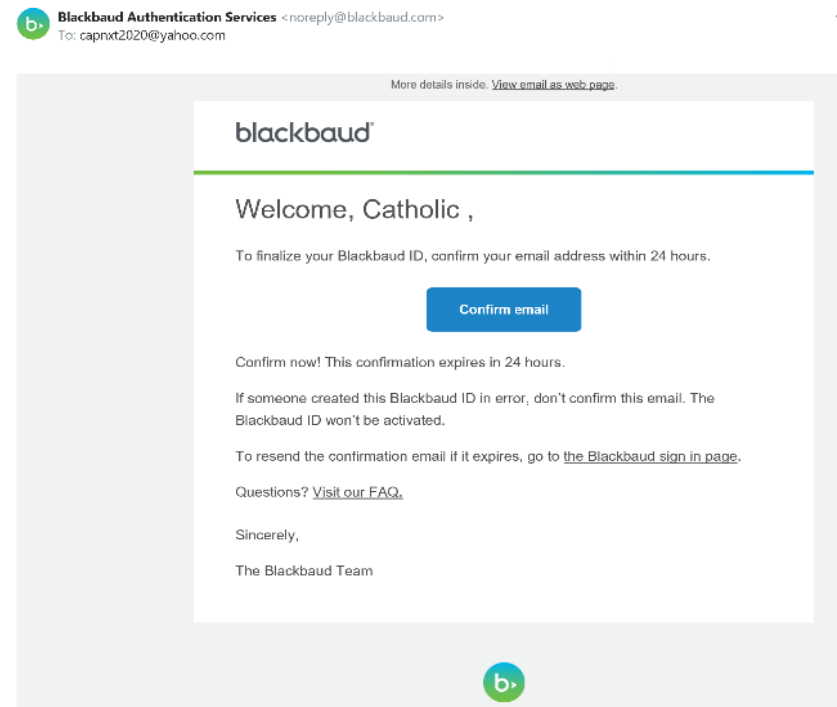
Raiser's Edge: How to Log In

Logging in the First Time

Click 'Confirm Email' on the link you receive in your inbox.

You will be directed one more time to the login page.

From now on, you can go straight to the login page without the need to repeat any of these steps.



Raiser's Edge: How to Log In

The Login Page

Bookmark:

renxt.blackbaud.com

Your Blackbaud ID is the email address you provided, where the initial invitation was sent.

If you forget your password, follow the instructions after clicking 'forgot password'

For users that have set up the account using a gmail email, you can set up to sign in with Google. Please do this only if you are already comfortable with how Google sign in works.

The screenshot shows the login interface for Blackbaud ID. At the top, it says "Blackbaud ID" and "Sign in to continue to Raiser's Edge NXT". Below this are two input fields: "Blackbaud ID" with a placeholder "email address e.g. name@domain.org" and "Password". There are links for "Forgot password?" and a checkbox for "Remember my email". A blue "Sign in" button is present. Below the button, it says "or" and a "Sign in with Google" button with the Google logo. At the bottom, there are links for "Need an account? Sign up" and "Need help? Can't find your product sign-in?".



WEBINAR Q&A

Q&A

- ***What constitutes an active donor?***
 - An active donor would be considered anyone who has made a gift whose record is still current in the database. When using donation information to determine how to target different people, you may look at donation activity going back anywhere from 1 to 10 years.
- ***Some of our current parents are also alumni. Should they be added/included in the database?***
 - Yes! Although a current parent may not be willing/able to support the school other than their current parental responsibilities, it is important to retain his/her information for future activity.
- ***Can the school/academy enter new data that is currently not in the Raiser's Edge database? What can be added and who will have access to it?***
 - The school has the ability to enter data on gifts and constituents into Raiser's Edge. It is recommended that you add in past gifts and any information you may have on current or potential supporters that is not currently in the database. This will help you greatly with future fundraising efforts. Any data that is entered can be viewed by Futures in Education and up to four users that are designated by the board chair or principal.
- ***Can you add multiple phone numbers or email addresses for a single constituent record?***
 - Yes, when adding or editing a constituent record, you may add as many emails or phone numbers as has been provided. Be sure to indicate the correct primary contact information.
- ***How do you handle a change of name, e.g., marriage or divorce?***
 - In this case, you can go into the constituent record and edit the name.
- ***How do you handle a couple with different last names but one postal address? And multiple email addresses?***
 - Using the 'Relationships' section of a constituent record, you can create a relationship between two records or simply record a spouse's name. This will allow for the mailing address to be updated to include the spouse's name. In some instances, if two records exist and there is different information, like graduation year or school, it may make sense to do two separate mailings. At no real incremental cost, emails should always go out separately to all available email addresses.

Q&A

- ***If someone is deceased, should that person be removed from the database or just marked as deceased?***
 - It is always good practice to maintain records in your database and not to delete them. In the case where a constituent has passed, there is an indicator to mark deceased. If you were to remove a record from the database, you may also remove valuable information about previous gifts and even class information - so for example, if there were 30 graduates and one has been deleted, future users of the database may wind up searching for that deleted record.
- ***In working with duplicates, how do we determine if two similar records belong to the same person?***
 - Chances are that if two records share the same name and address, they belong to the same person, but that is not always the case. It could be father/son or even just different people with a common name. For alumni records, looking at class year can provide a clue. If the year is different, it may in fact be two different people. You can search for the individual(s) using a service such as Whitepages. If they are alumni records, it may help to look at the 8th-grade attendance records as well. If you did a few quick searches, and don't feel comfortable, keep both. If you have a number or email, just ask!
- ***Can Parishioner be added to the Donor Type dropdown?***
 - Yes, great recommendation. Parishioner has been added as an option for Donor Type. If you come across other categories, please share so we may add them to the dropdown.
- ***Is ACH one of the options for the gift 'Payment Method'?***
 - Yes, select 'direct debit'.
- ***Can first name, last name, and email be downloaded to Excel in separate columns?***
 - First name and last name are available columns that may be selected when you are in the list view. We have added them to the end of several of the lists for convenience. Email address downloads in a separate field. The download does not bring over the title, which is helpful for mailings. We are trying to get this resolved with Blackbaud.
- ***Is there a service to add email addresses to the list?***
 - There are several vendors that offer a service to find email addresses based on other record information you have. We recommend Blackbaud EmailFinder. Futures in Education is currently in a contract with Blackbaud that allows one free email screening. We are targeting using the service in early February after we get past some year-end cleanup work. It is important to note that the match rate of these services is usually low. A grassroots effort to find email addresses is still the best option.

Q&A

- ***Are postal mailings created directly from RE? Or do you export records to a mailing program?***
 - For postal mailings, Futures in Education uses the database version of Raiser's Edge, which is not currently available to the schools/academies. You may contact Futures to request a mailing list or simply download an active constituent list in NXT. It is imperative that you only use a list that clearly indicates 'ACTIVE' records to avoid mailing to incorrect, deceased, etc.
- ***How do you integrate Raiser's Edge with an email management tool such as Constant Contact or MailChimp?***
 - Initially, a simple download of email addresses from active records to then be uploaded to the email tool will suffice. For subsequent updates, the email tools typically recognize previous email uploads and opt-outs so you can upload a new full file each time. Futures in Education can put a tutorial together on this item in the future.
- ***Please clarify the relationship between RE and CAP and what data is currently housed in the database for my school/academy.***
 - Raiser's Edge (RE) is the database used to store alumni and all other school/academy constituent and gift information. Catholic Alumni Partnership (CAP) is the name of the program that was created to reach out to Catholic elementary school alumni. 'CAP' records are stored in RE. The database can be used to store any school/academy constituents beyond just alumni. The data currently housed in RE is dependent on when your school/academy joined CAP and what the school provided to Futures in Education at that time.
- ***Is it worth the effort (work hours, etc.) to be trained on and to use a database such as Raiser's Edge? What if we do not have a good return on our fundraising efforts?***
 - Using a database to track gift activity, regardless of the size of the organization or the amount of gifts is ALWAYS a best practice that should be followed. Without being able to track historical information on gifts and data on your constituents, there will be limitations to the fundraising results your academy can achieve. Futures in Education will continue to work on making use of the database as simple as possible.
- ***How do monies received by Futures in Education for the school/academy get disbursed?***
 - At the beginning of each month, Futures in Education runs a report of all donations received for each school/academy via mail or online. If the donations occurred around the time of a mailing, the mailing costs are deducted from the total and disbursed electronically to the school/academy bank account. Outside of covering mail expenses and credit card fees, 100% of the monies received are sent directly.
- ***If our school/academy has not yet provided its alumni records, how do we start?***
 - Please email cap@futuresineducation.org for further instructions.