• This session is in **listen-only mode**.

• Please use the **Q&A Panel** to submit questions.

• The audio for this webinar will be **broadcast through your computer**. Once you join the presentation, a small audio broadcast box will appear on your screen and you will hear the host through your computer speakers. If you are unable to listen to the audio through your computer and wish to dial into the conference line, please use the information below:

• **Teleconference information**

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  Call-in toll-free number: 1-866-410-6539 (US & Canada)
  Call-in number: 1-660-422-5471 (US & Canada)
  Conference Code: 843 654 3232

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Presented by:
Bill Connors, CFRE
@billconnorscfre
bill@billconnors.com
• This webinar is about:
  - How you can use The Raiser’s Edge to be more efficient
  - How you can more efficiently use The Raiser’s Edge
AREAS OF FOCUS

• Core functionality
  - Word merge tricks with The Raiser’s Edge
  - Dashboards
  - RE mobile app for smartphones and iPad

• Additional modules for The Raiser’s Edge
  - RE:Search for major gift management
  - RE:Queue for automating processes in The Raiser’s Edge
  - RE:Recurring Gift Management for recurring donations
  - RE:Tribute for gifts given in honor or memory of someone
• If the gift amount is larger than $100 then thank the donor for their “generous” gift otherwise leave that word out of the thank-you.

• If the gift is for the Cardiology Fund then include a paragraph about recent work at your hospital about cardiology.

• If the solicitor on the gift is Mark then print Mark’s scanned signature and signature block, otherwise print Mary’s scanned signature and signature block.

• Inserts the words “Friends at” in the Salutation for organizations who have made a gift but do not have a contact.
 purposely

• Always turn on Field Codes before
  - Adding If…Then…Else…
  - Working in a letter in which If…Then…Else… has been used
• Shortcut: Alt+F9
**DASHBOARDS**

- Stop photocopying most checks and passing most things around
  - It wastes paper and trees
  - It wastes time
  - It’s a security risk
  - It delays the distribution of information
  - See fundsvcs.org

- Management and fundraisers should use the Recent Gifts List dashboard

- Try to stop using queries, exports, and “reports” in Excel to update staff on how things are going…
  - Use “canned” reports saved as Favorites on the Home page
  - Use dashboards
    - Tip: the Campaign, Fund and Appeal Summaries, for most accurate results need to have BOTH outright and pledge payments selected
MOBILE FUNCTIONALITY

Data Portability
- Optimized presentation of constituent information for smartphone
- Up-to-date information for constituent profiles—no more printing static copies
- Access recent gift data
- No more lugging around binders or laptops
- Add constituents as Favorites for offline access
- Leverage native smartphone functions like click-to-call, mapping, email, text

Ease of Update
- Meets users where they are used to working
- Add/edit notes and call reports on the road—right into the constituent record
- Complete your assigned actions and add new actions
CONSTITUENT RECORD

Constituent Record
- Easy to read contact information
- Email, call or text right from the constituent record
- See Details, Giving, Notes, Actions, Relationships
CONSTITUENT RECORD DETAILS

Full name: Dr. and Mrs. Robert C. Hernandez
Nickname: Bob
Birthday: 03/14/1961 (51 yo)
Spouse: Hernandez, Wendy
Position: CEO
Company: Davis & Johnson Pharmaceuticals
School: Wake Forest

Class of: 1987
Solicitors:
- Staff: Audrey I. Lorenz
- Relief Proposal: Mohammed Rahman
- Volunteer: Lane A. Pembroke
Constituent Codes:
- Board Member
- Volunteer
- Alumnus
CONSTITUENT GIVING HISTORY

$322,925.00 LTG

$50.00 4/21/2012
Natural Disaster Relief Fund
Cash

$150,000.00 4/10/2012
Natural Disaster Relief Fund
Cash

$5,000.00 12/21/2011
Building Fund
Cash

$5,000.00 10/20/2011
Building Fund
Cash
Dashboards for quick access to gifts and actions
MORE INFORMATION ON MOBILE

www.blackbaud.com/re-mobile-app

For Mobile Users

What is The Raiser’s Edge mobile app?

As an on-the-go fundraiser, you’re probably accustomed to creating letters of constituent information or packing up your laptop as you head out to visit your supporters. Now, with The Raiser’s Edge mobile app, you can access up-to-date constituent profiles—right from your Smartphone. With constituent information, including recent gift data, at your fingertips, and quick access to enter, edit, and dictate both Actions and Notes, you’ll always have what you need to make each visit successful.

The Raiser’s Edge mobile app is available to customers at no additional charge, as a benefit of maintenance. Explore the app features or download the datasheet to learn more about its functionality.

1–2–3–Mobilize

1. Install The Raiser’s Edge app from your app store or marketplace to your iPhone, Android or Blackberry device (search for “Raiser’s Edge”)
2. Obtain your organization’s unique System Key from your Administrator
3. Log into the app using your Raiser’s Edge credentials and the System Key from Step 2

Important Knowledge Base articles:

- How I’m going to set up The Raiser’s Edge mobile app

For Administrators

Introducing The Raiser’s Edge mobile app

For nonprofits with employees who spend much of their time away from the office, The Raiser’s Edge mobile app provides access to important constituent data while you’re on the go. They can access up-to-date constituent profiles—right from their Smartphone, with constituent information, including recent gift data, at their fingertips and quick access to enter, edit, and dictate. They’ll always have what they need to make each visit successful.

The Raiser’s Edge mobile app is available to customers at no additional charge, as a benefit of maintenance. Explore the app features or download the datasheet to learn more about its functionality.

Webinar

Get an overview of the app and to learn how to set up The Raiser’s Edge for mobile access.

Webinar recordings and presentations

You’ll find all the information you want in this webinar recording and presentation library.
Do away with the “major gifts spreadsheet”
Use the Prospect List and Proposal Status dashboard panels – real-time data, real-time updates, drill-through functionality, stats that your spreadsheets aren’t going to have
Be laser-focused on what Proposal fields really provide value and need to be kept up to date
Use Chronology

Making a Major Impact with a Major Gifts Program - April 2012

Recorded Webinar http://youtu.be/M-sXEAtWYew

Presentation Slides
Debra Holcomb, Yosemite Conservancy, San Francisco:

“I love Queue. It saves me between 4 - 6 hours a week. I'm able to be much more efficient, consistent and productive. I produce reports daily, weekly, monthly and quarterly without having to think about them -- Queue sends them out automatically and lets me know that it was ‘completed successfully.’ So, even while I'm at BBCon (or in Yosemite), our fundraisers, finance department, my supervisor and others who need reports, find them ready for them as soon as the come in in the morning.”
RECURRING GIFT MANAGEMENT (EFT)

• It’s much more efficient for an organization to get—or take—monthly gifts than to keep asking (and donors like that, actually).
• It’s inefficient—as well as very bad security—to save the credit card numbers and change them every month.
• Without this module, you can make the process easier and more secure by setting up a recurring batch, but if you do things right, you’ll need to update both the recurring batch and the recurring gift when changes occur.
• With this module, you do the data entry once and then RE does most of the rest of the work for you—you don’t even have to set up the batch.
• Credit cards expire and have to be renewed; direct debits with this module is the most efficient way to get annual fund-type gifts.

Making the Most of Recurring Gifts - February 2012
Recorded Webinar http://youtu.be/JOhpKK8Psec

Increase the Lifetime Value of your Supporters – Create a Recurring Gift Program (white paper)
https://www.blackbaud.com/nonprofit-resources/recurring-giving-white-paper.aspx
Hi Jenny - we've been using it for several years now - not just for recurring gifts, but pledge payments via debit/credit card. The best part about is creating a transmission file, which pulls everything into a batch for you then you send the batch to your processor for authorization…, it drops the autho code back down into the batch, you remove any kickbacks and post the batch. It literally takes about 15 minutes to process anywhere from 50 to 125 transactions in a given month. As for getting donors to go the recurring gift route – most of ours process monthly, but some on a quarterly or yearly basis. Currently, we collect over $40,000 per year or an average of $3,380 per month. Since most people are using D/C cards to pay for everything – it’s a pretty easy sell and we offer a checkbox to process their card automatically on their pledge reminder or as a payment option on the solicitation piece. … we stress the ease of use and overall costs savings in reducing mailed statements and/or annual solicitations. Note that recurring gifts are so much better than pledges, because finance doesn’t track them as receivables, but you can still run reports on expected income for the year. It’s definitely worth the investment.
We have been using the EFT module for monthly pledge payments and recurring gifts... we use all the acronyms RE, FE, BBMS, BBNC...our membership data processors love the ease. I like that in order to keep PCI compliant that the credit is token/somewhat hidden on the pledge and is easy to change when the donor cards expire or they need to change the card. Two thumbs up!
We as fundraising professionals have a fine line to walk—we need to do right by our donors, but also by our organization. Our organizations don’t exist, and neither do our fundraising departments, to serve as a tribute acknowledgement bureau—tributes should be a way to raise money for the mission and programs or our organization.

Make sure your devices that mention tribute keep efficiency in mind…

- Suggest a minimum dollar donation per tribute
- Don’t provide options for the donor’s preferred name format, special messages to the tribute acknowledgee, and so forth—collect just the information you need for RE

Consider using 8.5 x11” letters rather than cards

Use the If…Then…Else feature with your Donor Acknowledgement Letters to insert tribute details into your regular set of letters

Use the Honor/Memorial Acknowledgement Letter feature in Mail
Q&A AND CONTACT INFORMATION

Bill Connors, CFRE

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(San Francisco)