Raiser's Edge NXT *Essentials Implementation* Scope of Work

The goal of this project is to ensure the successful implementation of **Raiser's Edge NXT**. The *Raiser's Edge NXT Essentials Implementation* includes the following:

- Configuration and launch of the **Raiser's Edge NXT** via a cohort implementation workshop
- Secure cloud hosting of **Raiser's Edge NXT**
- Activation of **Blackbaud Merchant Services (BBMS)** for secure payment processing
- Activation of Blackbaud Online Express for simple online fundraising and email marketing
- **Success Services** consulting to create a results-driven comprehensive plan, along with tactics and tools to track your success

Project Approach

The **Raiser's Edge NXT** *Essentials Implementation* is designed to provide a prescriptive and strategic approach based on best practices.

Deliverables

The following section describes the tasks that Blackbaud will perform as part of the **Raiser's Edge NXT** *Essentials Implementation.* Additions or changes to the areas below will result in a Change Order to this Scope of Work.

Deliverable Area	
Milestone	**Tasks**
Project Preparation	- Hold a kickoff call to review this Scope of Work and the project implementation methodology - Discuss your organization's mission, strategies, goals, and information needs - Establish the project timeline, incorporating training and blackout dates
Design	- Review your high-level business requirements based on areas listed in the **Raiser's Edge NXT** functional configuration - Review the **Raiser's Edge NXT** Pre-Implementation Workbook and suggest best practice recommendations to be included in the database configuration - Discuss reporting and output needs to confirm data mapping - Provide Best Practice Policies and Procedures Guides, which will serve as documentation and guidance for standardized usage of the **Raiser's Edge NXT**

Deliverable Area	
System Configuration and Administration	- You will set up <u>Blackbaud Payment Service (BBPS)</u> account credentials - You will set up a <u>Blackbaud Merchant Services (BBMS)</u> account - Blackbaud will guide the customer through configuring security, including home page set up in the **Raiser's Edge NXT** database based on pre-configured security by role. Up to 3 **Raiser's Edge NXT** users will be configured, associating them with the appropriate user group.
Raiser's Edge NXT Functional Configuration	Blackbaud will guide the customer through each of the following in the **Raiser's Edge NXT** database via cohort implementation workshops: **Constituent and Gift Data Management** - Best practices for data entry to maintain integrity - Constituent codes for supporter segmentation - Donor acknowledgement process - Campaign, fund, appeal and package structure - Tribute and sustainer giving **Measuring Success** - Segmentation and list building capabilities - Benchmark analysis in Data Health Center Scorecard - Executive and financial reporting - Solicitor and portfolio management **Multi-Channel Fundraising** - Email marketing strategy - Online giving, provisioning **Blackbaud Online Express**™ - Crowd-funding through **everydayhero**™, and how customer driven fundraising intiatives integrate directly into the **Raiser's Edge NXT** database - Mailing management - Direct mail - Monthly appeals - Cultivation mailings **Major Gift Management** - Identitication of potential supporters utilizing wealth ratings - Interaction strategy for prospects - Management of your portfolio within the Work Center - Invitation process to allow solicitors to access the **Raiser's Edge NXT** Web View, including Control Panel set up

Deliverable Area	

	Additional Focus Area
	
	• Blackbaud will guide the customer through the [configuration of **one** additional module](#) purchased in their **Raiser's Edge NXT** database:
	    ○ **RE:Planned Giving**
	    ○ **RE:Search**
	    ○ **RE:Event**
	    ○ **RE:Volunteer**
	    ○ **RE:Alum**
	    ○ **RE:Membership**

Data Enrichment Tools	• Review the tools located in the [**Data Health Center**](#), including:
	    ○ [Data Health Scorecard](#)
	    ○ [BBMS Credit Card Updater](#) (if applicable)
	    ○ [AddressFinder](#)
	    ○ [EmailFinder](#)
	    ○ [PhoneFinder](#)

Raiser's Edge NXT Success Services	Following the completion of the cohort implementation workshops, Blackbaud will provide [1:1 success services consulting](#) to further understand your organization's fundraising plan, goals, and desired outcomes. Based on this understanding, we will create a results-driven comprehensive plan, including fundraising and stewardship ideas, tactics and tools to track your success. Your **Raiser's Edge NXT** consultant will assist you in selecting one of the following **Success Services** focus areas: • Annual Giving: *Enhance Your Ask* • Annual Giving: *Expand Your Sustainer Giving Reach* • Annual Giving: *Campaign Year-End Fundraising* • Multi-Channel Fundraising: *Major Gifts (80:20) Rule* • Multi-Channel Fundraising: *Accelerate Post Event* • Multi-Channel Fundraising: *Peer to Mission*