Raiser's Edge NXT Module Services

Consulting services have been purchased to implement one (1) of the modules listed below for **Raiser's Edge NXT**. At the start of the **Raiser's Edge NXT** module implementation, the consultant will confirm which of the following services will be performed as a part of the engagement. If additional services are desired, they must be purchased and a Change Order to this Statement of Work will be necessary.

Deliverables

Select one (1) module from the following list of services to be delivered.

Raiser's Edge NXT Module Services Deliverables	
Service	**Tasks**
RE: Alumni Configuration	• Demonstrate the proper creation of education information. • Review the importance of the Primary Alumni Information checkbox. • Discuss Alumni giving programs and the current structure of campaigns, funds and appeals related to alumni giving. • Discuss Alumni mailing needs. • Provide an overview of standard education reports.

RE: EFT Configuration	• Review Configuration, Administration, and User Options, including:
	  ◦ Confirm set up of Blackbaud Merchant Services (BBMS) for payment processing
	  ◦ Sponsoring financial institution set up, if applicable
	  ◦ Financial Institution Cleanup tool
	  ◦ Convert Pledges to Recurring Gifts utility
	  ◦ Batch Options in Business Rules
	  ◦ Batch security
	• Discuss EFT record management:
	  ◦ Review the difference between recurring gifts and pledges.
	  ◦ Review the correct process to link constituents to financial institution relationships for direct debit gifts.
	• Methods for creating and maintaining recurring gifts:
	  ◦ Marking gifts as recurring and defining schedules
	  ◦ Identifying upcoming credit card expiration dates
	  ◦ Amending recurring gifts
	  ◦ Holding, Terminating, Skipping and Rolling back transactions
	• Transaction processing in Batch, including credit cards and direct debits.
	• Provide an overview of standard EFT reports and dashboards.

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RE: Event Configuration	• Review the following:
	   • Types of events
	   • Unit pricing
	   • Registration and participation
	   • Expense tracking needs
	   • Seat tracking needs
	   • Action and note tracking needs
	   • Reporting needs
	• Make recommendations for and assist with the entry of one event.
	• Provide an overview of standard event reports.

RE: Member Configuration	• Configure membership programs, categories, and subcategories (up to three). • Configure one Membership Card template. • Configure Renewal Notice templates (up to two). • Provide an overview of standard membership reports.

RE: Planned Gift Tracker Configuration	• Demonstrate the entry of planned gifts including:
	   • Vehicle
	   • Gift Status
	   • Receipt Amount
	   • Remainder Amount
	   • Expected Maturity Year
	   • Revocable checkbox
	   • Gift Has Been Realized checkbox
	   • Assets
	   • Planned Gift tab and variable fields dependent on Vehicle
	   • Planned Gift Relationships
	• Assist in the setup of up to 5 planned gifts.
	• Review planned gift acknowledgement processes and assist with the setup of planned gift acknowledgement letters (up to two).
	• Provide an overview of standard planned gift reports.

RE: Queue Configuration	• Review current output needs to determine the use of Queue. • Provide instruction on the use of Queue including: o Setting up a queue, including setting up one-time or recurring queues • Establishing the rules for processing the queue. • Deleting a queue.

RE: Search Configuration	• Configure major, corporate, and planned gift prospect and proposal management components, including:
	   • Classification and status tables
	   • Philanthropic interest types
	   • Financial information types and information sources
	   • Prospect rating sources and categories

Raiser’s Edge NXT Module Services Deliverables	
	• Proposal types • Other critical fields, as necessary • Review the strategy to track proposals for individuals, corporations, and foundations. • Discuss suggested data sources for giving capacity, philanthropic giving history to other organizations, and other wealth indicators. • Provide an overview of standard prospect and proposal reports.
RE: Tribute Configuration	• Review honor and memorial gift tracking needs. • Discuss campaigns, funds and appeals structure in relation to entering tribute gifts. • Demonstrate setup of honor/memorial records and acknowledgee relationships. • Demonstrate entry of honor/memorial gifts. • Discuss the donor and honor/memorial relationship acknowledgement process and set up associated letters (up to two). • Provide an overview of standard tribute reports.
RE: Volunteer Configuration	• Review the following: o Number of active volunteers o Typical jobs or assignments o Availability and Interests tracking o Medical and Special needs, if applicable o Volunteer application process o Volunteer checklist items o Skill and/or certification tracking o Volunteer hours tracking • Make recommendations for the efficient entry of volunteer data. • Provide an overview of standard volunteer reports.
Post to GL Configuration (third party)	• Discuss the fund structure within **The Raiser’s Edge** as it applies to the posting of entries to the General Ledger: • Complete a global change to mark pre-interface gifts as posted, if necessary • Determine if gift sub-types are necessary • Identify financial information that will not transfer, such as campaigns and appeals • Identify information that will be available in the general ledger pre-posting file based on **The Raiser’s Edge** configuration • Set up **The Raiser’s Edge** fund posting grids (up to 10), demonstrating the new default functionality for ease of entering accounts on the distribution grids. • Once all of **The Raiser’s Edge** funds have been established and the global change has been completed, the consultant will demonstrate one posting of gifts and generation of the pre-posting file from **The Raiser’s Edge.**

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	Note: Customers will be responsible for importing the pre-posting file into their accounting system. Blackbaud will not provide assistance importing into third party accounting systems.
Conversion Testing Assistance	• Develop a test plan to ensure the validity of conversion test runs. • Review the initial mapping document completed by your project team in collaboration with the Conversion Analyst. This will be used to convert and migrate data to **The Raiser's Edge** and produce a first test run. • Work with your organization to validate **test run one** and modify the data mapping document in collaboration with the Conversion Analyst (this may be done remotely to reduce travel costs). • Test configuration and output of desired reports, queries, or mailings as necessary. • Provide recommendations or instructions for additional testing for your team members, as needed.

Additional Mailing Configuration	• Configure up to two (2) mailings.
	  o Examples can include:
	    ▪ Donor Acknowledgement letters
	    ▪ Quick Letters
	    ▪ Appeal Cards
	    ▪ Receipts

Additional Report Configuration	• Configure up to five (5) standard Reports, Dashboards, Queries, and/or Exports based on your organization's needs.
	  o For example:
	    ▪ 2 Queries, 3 Reports
	    ▪ 1 Export, 2 Queries and 2 Reports
	    ▪ 4 Reports, 1 Query