Basic Data Conversion for Altru

Your organization is now poised to hit the ground running by converting your valuable existing data into your Altru solution.

1.1 Data Services Overview

Your organization has engaged Blackbaud to convert one (1) single source database as outlined below. General requirements and procedures affecting the conversion are listed below.

1.1.1 Basic Conversion Specifics

To best manage the resources associated with any data conversion effort, we recommend dividing necessary tasks to appropriately leverage the strengths of Blackbaud's Data Conversion Services team and your organization's technical team.

To support this, the Blackbaud team will:

- Prepare a detailed conversion plan
- Prepare data mappings
- Prepare conversion program
- Assist your organization's staff assigned to the conversion with the overall process

Your organization's team will be responsible for:

- Supplying Blackbaud with the source data to be converted (per specifications listed below) in a clean and acceptable state prior to conversion
- Supporting Blackbaud's analysis and planning efforts, as required
- Assisting Blackbaud with data mapping preparation
- Defining acceptance testing criteria
- Assisting Blackbaud with remediation of any conversion issues
- Providing Blackbaud with full and complete access to the data to be converted

1.1.2 Conversion Assumptions

The following data from your organization's basic source will be converted in the test conversion and the final conversion:

Constituents

- Constituent ID and type
- Individual Constituent name fields
- Organization name
- Biographical (Gender, Inactive, SSN, Birth date, Deceased, Marital Status)

- Spouse names or Spouse ID (link to a constituent)
- Household (created for constituents that are spouses only)
- Addresses (Primary address, alternate address only)
- Employer address
- Organization Relationship and position
- Phones (up to 4)
- Email address (up to 4)
- Website (one per constituent)
- Attributes (up to 10)
- Notes (up to 10)
- Constituencies (up to 10)
- Membership (one membership per constituent) – includes membership level, ID, join date, last renewal date, expiration date, name on card
- Volunteer (volunteer record only – no other information will be converted to the Volunteer record, no job assignments, no timesheets)

Gifts

- Constituent ID (links gift to constituent)
- Gift ID (unique ID, not converted to Altru)
- Only Cash gifts are converted to Altru. (No pledges, matching gifts, membership revenue or other types of gifts)
- Gift Amount, date, payment method, reference
- Receipt date, receipt amount, receipt status
- Acknowledge status and date
- Check number, Credit Card type and expiration date
- Fundraising Hierarchy.
- One gift note
- Gift Attributes (up to 5 per gift)

1.1.2.1 Additional conversion information:

- The Altru Basic conversion is designed to be a basic conversion and it will not meet your needs if you have a very complex source system and wish to convert more detail than what is listed above
- Only Cash gifts are included in the Basic conversion. No other types of gifts including Pledges, Matching Gifts or Membership Gifts will be converted
- Memberships: Membership join and expiration date will be converted. There will be no *membership transaction history* in Altru
- Altru tracks Membership payments as Membership revenue, however, this is not included in the Basic conversion as Altru requires that the payment be linked to a membership transaction. If Membership transactions are included in the gift data submitted they will be converted as fundraising revenue into Altru
- All gifts will be converted as Do Not Post
- Negative gifts will not be converted

- Blackbaud will designate the Default Primary Addressee/Salutations based on data contained/converted in the Title, First Name, Middle Name, Last Name, and Suffix fields
- Data will not be converted to custom tables within the Blackbaud Altru solution unless specifically mentioned in the Conversion Assumptions. Any conversion to custom tables will be estimated once design of these tables has been established and a change order may be required
- The conversion includes one test run and one final run
- Direct transfer of comparable data from your source system to the Blackbaud system as stated in this Scope of Services. Unless otherwise indicated in this Scope of Services, your data will be converted "as is" and does not include the following:
    - Changing/altering your data: Data will be converted as it exists in your source system
    - Creating data: We cannot create data that does not exist in your source system
    - Data clean-up: Code table consolidation, correction of spelling errors, proper casing, etc.
    - Software training (see separate scope of work, if applicable)
    - De-duplication of records
- No additional services are included with the Altru Basic Data Conversion

1.1.2.2 Common data elements that may affect your conversion:

- Altru does not have non-constituent data elements: Everyone is a constituent
- Constituencies that are generated by Altru are not converted. These Active Constituencies are Member, Donor, Loyal Donor, Major Donor, Patron, Event Registrant, Relation Only, Vendor, and Volunteer

1.1.3 Data Conversion Quality Assurance Approach

Your organization is responsible for defining data validation criteria so that the data validation matrix can be properly updated with the correct data validation quality assurance measures. Your organization will define a conversion acceptance test plan that will form the basis for validating the conversion from an end user perspective. The acceptance test plan will be refined as each functional Configuration and Design Area is completed, and it will be used to validate the incremental refinement of the automated conversion.

1.1.4 Data Format Requirements

Your organization will provide Blackbaud with the complete data set during the project, as needed. The format for the database must be provided in the same manner each time in order to ensure additional risk and time is not added to either side. Following is the minimum schedule for data submissions; however additional submissions may be requested during the Blackbaud implementation.

1. Initial submission
2. Final submission (go-live)

1.1.4.1 Submission Requirements & Limitations

Source data must be submitted in one of the following file formats*:

- Four (4) Access tables *or*
- Four (4) Single worksheet Excel spreadsheets
- Maximum of 50 fields per table/worksheet
    - Record limitations:
        - Less than or equal to 100,000 Constituent records
        - Less than or equal to 250,000 Gift transaction records

**Blackbaud will convert all constituent records from only one table or single worksheet spreadsheet and all gifts from only one table or single worksheet spreadsheet. The secondary spreadsheets may contain, for example, codes, relationship information, phone number, or notes.*

1.1.4.2 Media Format Requirements

Your organization's files must be submitted in one of the following media formats. If you cannot supply data in one of the following formats, your organization and Blackbaud shall discuss whether Blackbaud can accept it.

- Files transferred via secure FTP (File Transfer Protocol)
- CD or DVD-R
- FedEx encrypted hard drive