

Best Practices in the Use of Raiser's Edge Constituent Codes



BILL CONNORS, CFRE, bCRE-PRO

Independent Consultant and Trainer on Raiser's Edge

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blackbaud[®]
K-12
UC



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TITLE

Independent Consultant on Raiser's Edge (NXT and v7)

For

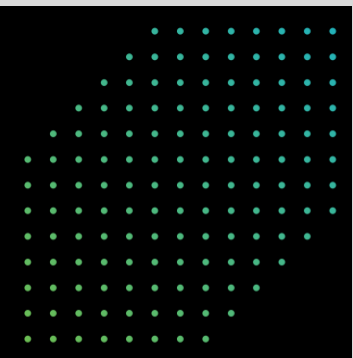
14 years (24 years with RE)

HOMETOWN

San Francisco, CA

ABOUT ME

- I'm in this line of work because of Junior Achievement in high school.
- I just graduated from grad school in May.
- I love dogs and ice cream!



Agenda

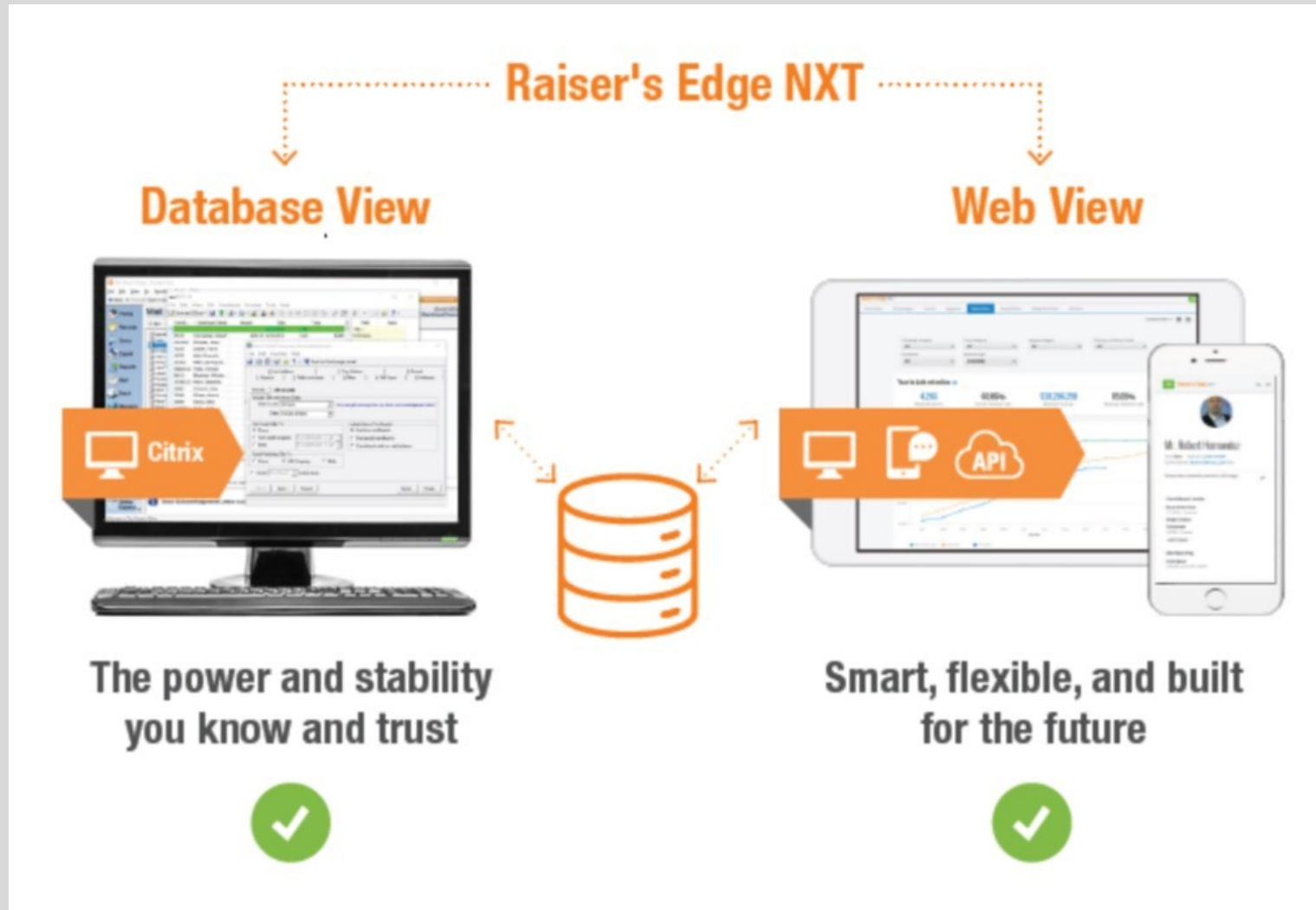
- What is the intent of constituent codes
- How can constituent codes be used in Raiser's Edge
- What are common “good” and “bad” constituent codes
- Using constituent codes in Query and Reporting

Terminology

These all mean the same thing:

- Constituent Code
- Constituency
- Constituency Code
- Cons Codes

Terminology



Purpose of Constituent Codes

At the core of it all, fundraisers ask 3 questions about the money they raise:

- How was it raised?
- What is it for?
- Who gave it?

In Raiser's Edge, this is tracked as:

- How was it raised? = Appeals
- What is it for? = Funds
- Who gave it? = Constituent Codes

Intention for Constituent Codes

Constituent Codes = Donor Types

- **Secondarily: Why are they in our database?**

DEPARTMENT
REVENUES AND FINANCIAL STATEMENTS

2017–2018 Annual Fund Participation:

- Board of Trustees: **100%**
- All current families: **98%**
- Current faculty: **100%**
- Alumni: **52%**
- Total donors: **3,081**

operating financial aid, philanthropy.

2017–2018 OPERATING EXPENSES

Category	Percentage
INSTRUCTION	42%
SUPPORT SERVICES	7%
GENERAL AND ADMINISTRATIVE	22%
FACILITIES AND DEBT SERVICE	7%
FUNDRAISING	22%

TOTAL GIVING SUMMARY

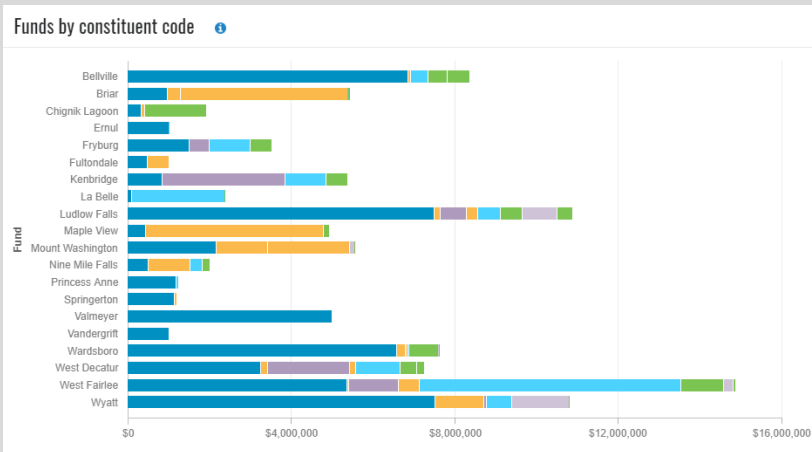
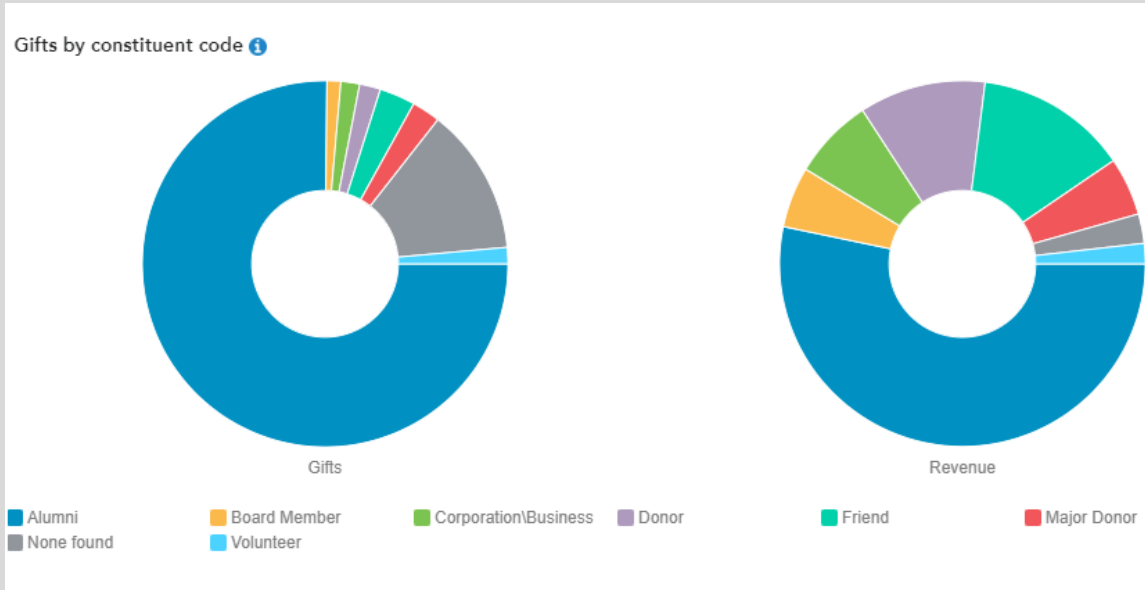
ANNUAL FUND	2017–2018
Alumni	\$1,442,426
Current Parents	\$1,905,626
Parents of Alumni	\$614,525
Grandparents	\$81,832
Current and Former Faculty and Staff, and Friends	\$45,955
Total 56th Annual Fund	\$4,090,364
Unrestricted	\$3,783,664
Restricted	\$306,700
Henry B. Sawyer, Jr. '32 Golf Tournament <i>(included above)</i>	\$165,500

GIVING TO ALL FUNDS	
Annual Fund	\$4,090,364
Cash Gifts to Capital	\$4,597,661
Total	\$8,688,025

BELMONT HILL SCHOOL
2017–2018 ANNUAL REPORT **9**

https://issuu.com/belmonthill/docs/bhs_2018_ar-layout_11192018?e=5308511/65882698

Purpose 1: Reporting



9/11/2012 Page 1

Statistical Reports

Constituency code	Number of constituents	Number of donors	Number of gifts	Total given	Average given per donor	Percent of participation	Percent of total given
Alumnus	19	19	109	\$136,965.00	\$7,208.68	100.00 %	2.84 %
Board Member	9	9	211	\$830,340.00	\$92,260.00	100.00 %	17.25 %
Corporate Member	2	1	6	\$4,475.00	\$4,475.00	50.00 %	0.09 %
Corporation\Business	20	16	81	\$245,860.00	\$15,366.25	80.00 %	5.11 %
Current Parent	3	3	10	\$8,975.00	\$2,991.67	100.00 %	0.19 %
Development Staff	7	7	67	\$138,570.00	\$19,795.71	100.00 %	2.88 %
Employee	2	2	12	\$38,260.00	\$19,130.00	100.00 %	0.79 %
Friend	49	49	391	\$1,601,757.01	\$32,688.92	100.00 %	33.27 %
Grandparent	1	1	21	\$10,985.00	\$10,985.00	100.00 %	0.23 %
Major Donor Prospect	2	1	1	\$100.00	\$100.00	50.00 %	0.00 %
Matching Gift Company	15	12	45	\$77,950.00	\$6,495.83	80.00 %	1.62 %
Member	9	8	85	\$97,780.00	\$12,222.50	88.89 %	2.03 %
Online Donor	2	2	23	\$9,105.00	\$4,552.50	100.00 %	0.19 %
Parent	2	2	2	\$600.00	\$300.00	100.00 %	0.01 %
Parent Corporation	2	2	5	\$10,300.00	\$5,150.00	100.00 %	0.21 %
Prospective Donor	3	3	7	\$21,100.00	\$7,033.33	100.00 %	0.44 %
Staff Doctor	1	1	5	\$1,300.00	\$1,300.00	100.00 %	0.03 %
Student	8	7	18	\$13,465.00	\$1,923.57	87.50 %	0.28 %
Subsidiary Corporation	3	3	6	\$24,000.00	\$8,000.00	100.00 %	0.50 %
Supporter	22	22	200	\$663,050.00	\$30,138.64	100.00 %	13.77 %
Trustee	9	9	59	\$109,325.00	\$12,147.22	100.00 %	2.27 %
Volunteer	23	23	273	\$728,220.00	\$31,661.74	100.00 %	15.13 %
Volunteer Site	8	6	7	\$15,700.00	\$2,616.67	75.00 %	0.33 %
<Unknown>	15	8	48	\$26,240.00	\$3,280.00	53.33 %	0.55 %
Total:	236	216	1,692	\$4,814,422.01	\$22,288.99	91.53 %	

Purpose 2: Filtering

Filter by constituent code

Use only primary constituent codes

Constituent codes

Any of these codes

+ Select values

Alumni X

As of

Today

Done Cancel

+ Add another constituent code filter

Select Cancel

New Gift Detail and Summary Report

File Edit Favorites Help

1: General 2: Filters 3: Gift Types 4: Attributes 5: Columns 6: Ind. Address 7: Org. Address 8: Format

By using the grid below, this report may be filtered on the items shown in the Selected Filters column.

Filters	Filter Option	Selected Filters
Appeals	Include All	<All Appeals>
Campaigns	Include All	<All Campaigns>
Constituent Codes	Include All	<All Constituent Codes>
Funds	Include All	<All Funds>

Selected Constituent Codes

Use constituent code from: Constituent Base constituent code hierarchy on: Constituent

Constituent Code	Description	ID
Acknowledgee	Ack	Ack
Added in Blackbaud NetCommu...	BBNC	BBNC
Alumnus	AL	AL
Corporate Member	CM	CM
Corporation\Business	CO	CO
Current Parent	CP	CP
Development Staff	DST	DST
Donor	DON	DON
Employee	EMP	EMP

Include these Constituent Codes

Description	ID
Board Member	BM

OK Cancel

Show inactive constituent codes

Querying is Not a Primary Purpose

Querying is not one of the primary purposes—you can query from just about anywhere, so “it’s easy to query from there” is probably not a good rationale for determining your constituent codes

Good Examples

- For Individuals
 - Board Members
 - Alumni/ae
 - Current Parents
 - Past Parents/Parents of Alumni/ae
 - Grandparents
 - Staff
 - Friends (vs. Individuals)
- For Organizations
 - Corporation/Business
 - Foundation
 - Community Organization
 - Government

Purpose of Constituent Codes

- Use it as it is intended, or not, but...
- It is not a miscellaneous code dumping ground
- Regardless, do not do the following
 - Use them to record donor information (donor, major, monthly/recurring, event, PG, GIK,...)
 - Use them to record prospect information (major, planned giving, event,...)
 - Use them to repeat information stored elsewhere in the record
 - Get into too much detail (events, committees)
- If you're not going to use it as intended, there is no reason that every constituent must have a constituent code

Two Locations



Armani R. Vidal

Spouse: [Carlie Mohabir](#)

Fundraisers: [Octavio H. Juergens](#), [Ashton W. Phan](#)

[+ Add summary note](#)

Constituent codes

Board Member

12/13/2015 - Present

Board Member

4/1/2011 - 7/1/2013

Current Parents

8/1/2010 - Present

[and 1 more](#)

Gift and marketing codes

Internal coding

Gift ID	3299
Gift code	<i>None found</i>
Constituency	Alumni

Constituent codes for Armani R. Vidal

Board Member

12/13/2015 - Present

Board Member

4/1/2011 - 7/1/2013

Current Parents

8/1/2010 - Present

Alumni

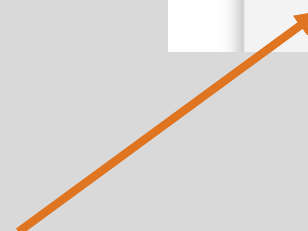
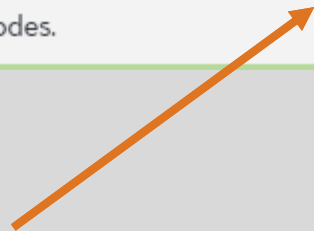
12/15/1996 - Present

[Close](#)

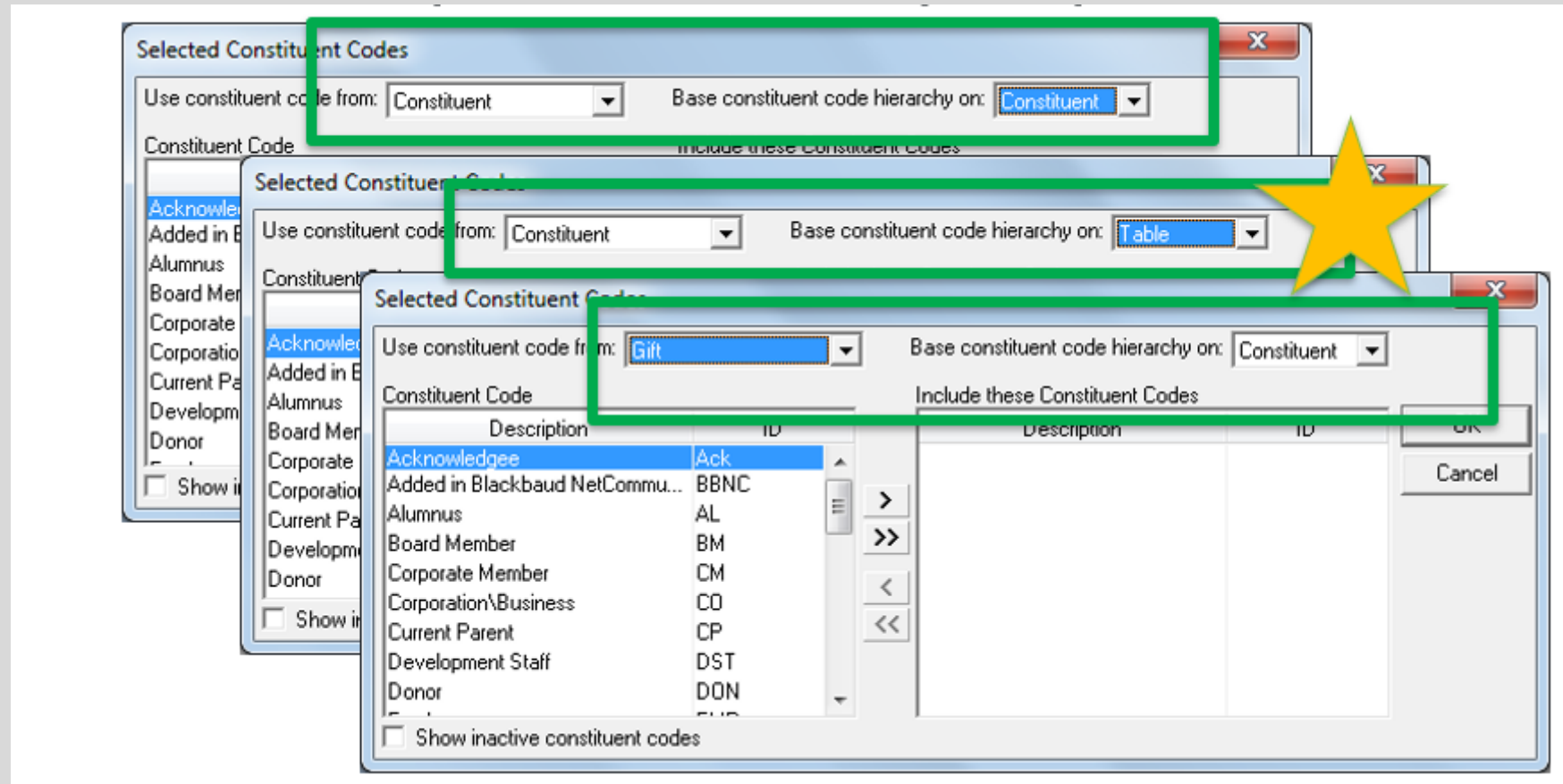
Reporting on Constituent Codes in the Web View

This screenshot shows the web view for 'Constituent Code Analysis for Giving'. The breadcrumb trail is: You are here: [Constituents](#) > [Constituent Records](#) > [Profile Information](#) > [Constituent Codes](#) > [Constituent Code Analysis for Giving](#). The main heading is 'Constituent Code Analysis for Giving'. The text below reads: 'For context of why donors give, we recommend you track their affiliations with your organization — such as Board member or Volunteer — as constituent codes on their records. Under **Gifts by constituent code** from **Fundraising, Analyze** or **Reporting, Overview**, you can break down giving by the constituent's primary constituent codes.'

This screenshot shows the web view for 'Constituent Code Analysis for Campaigns, Funds, or Appeals'. The breadcrumb trail is: You are here: [Constituents](#) > [Constituent Records](#) > [Profile Information](#) > [Constituent Codes](#) > [Constituent Code Analysis for Campaigns, Funds, or Appeals](#). The main heading is 'Constituent Code Analysis for Campaigns, Funds, or Appeals'. The text below reads: 'To quickly gauge which types of supporters are engaged and contribute the most to your success, analyze the giving toward your fundraising efforts — overall, or for specific campaigns, funds, or appeals — by their donors' primary constituent codes.'



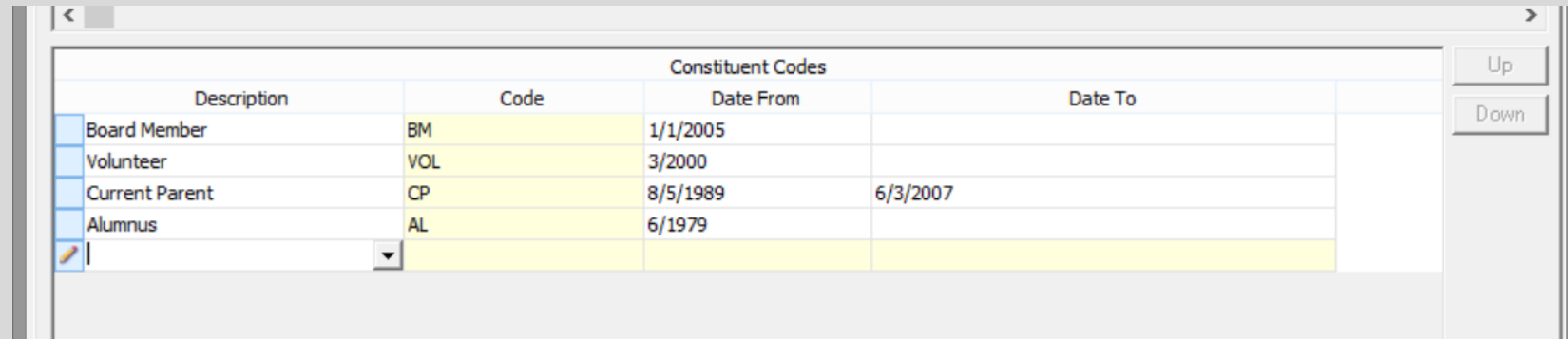
Reporting on Constituent Codes in the Database View



Data Entry

- If used as intended (and only if)...
- Everyone should have one
- But do not make the field required
- So create a weekly maintenance task to check

Data Entry



The screenshot shows a software interface for data entry. It features a table with the following columns: Description, Code, Date From, and Date To. The table contains four rows of data. To the right of the table are two buttons labeled 'Up' and 'Down'. Below the table is a search or filter input field with a dropdown arrow.

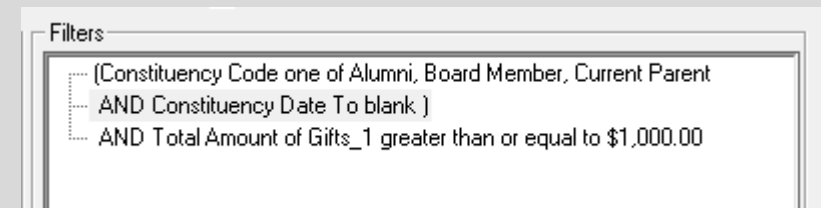
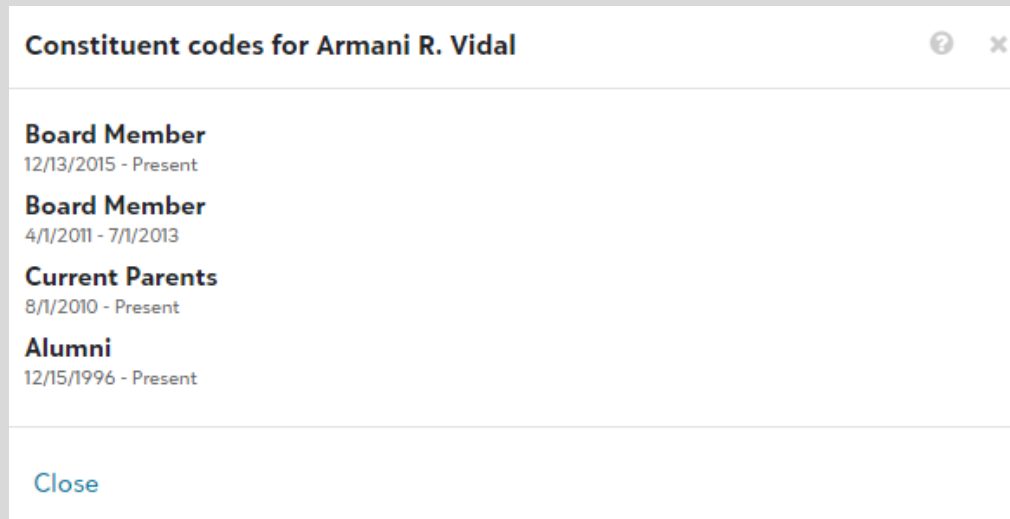
Constituent Codes			
Description	Code	Date From	Date To
Board Member	BM	1/1/2005	
Volunteer	VOL	3/2000	
Current Parent	CP	8/5/1989	6/3/2007
Alumnus	AL	6/1979	

- Have well-defined
 - The purpose of the table
 - The values in the table
 - There should be policy and procedure documentation
- Table order based on priority
- Data entry based on priority
- Date From and Date To maintained

Data Entry

Use the dates—they do work: the date range of the code needs to overlap the date range of the report

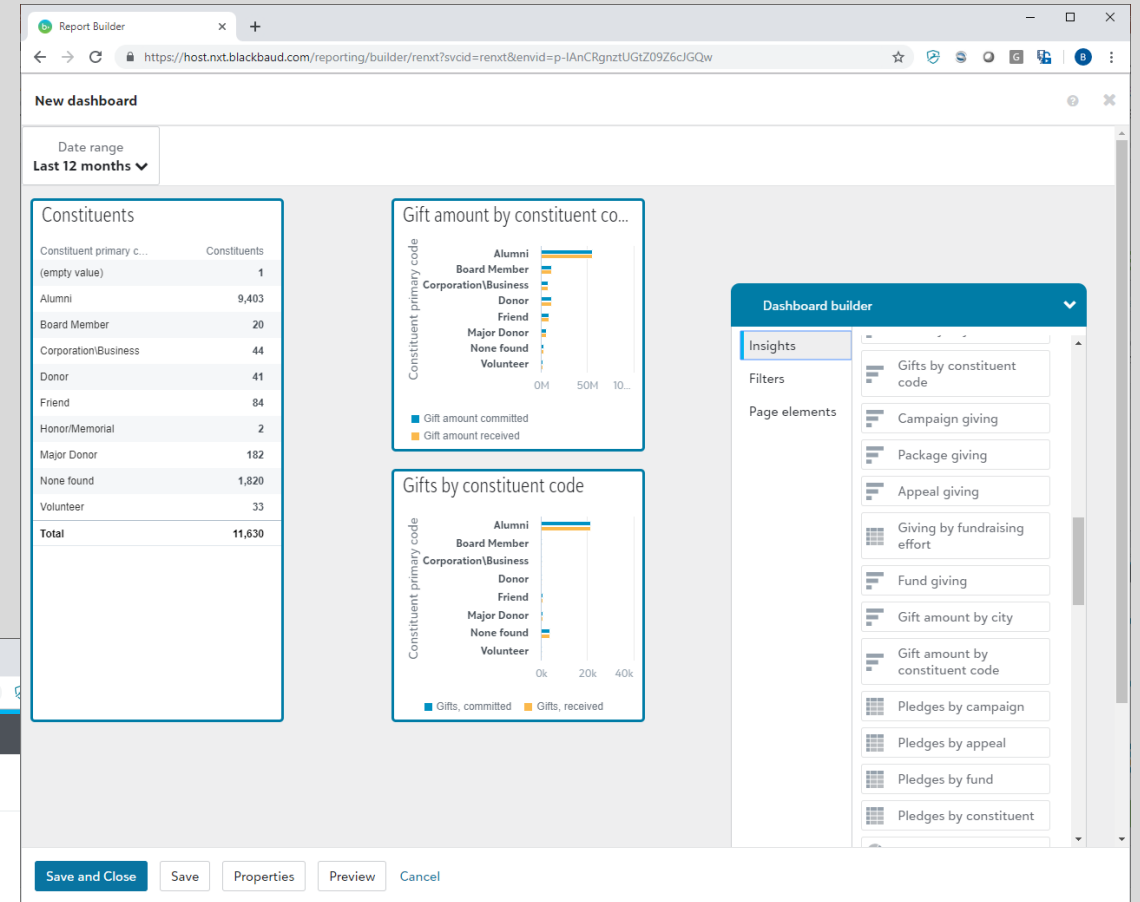
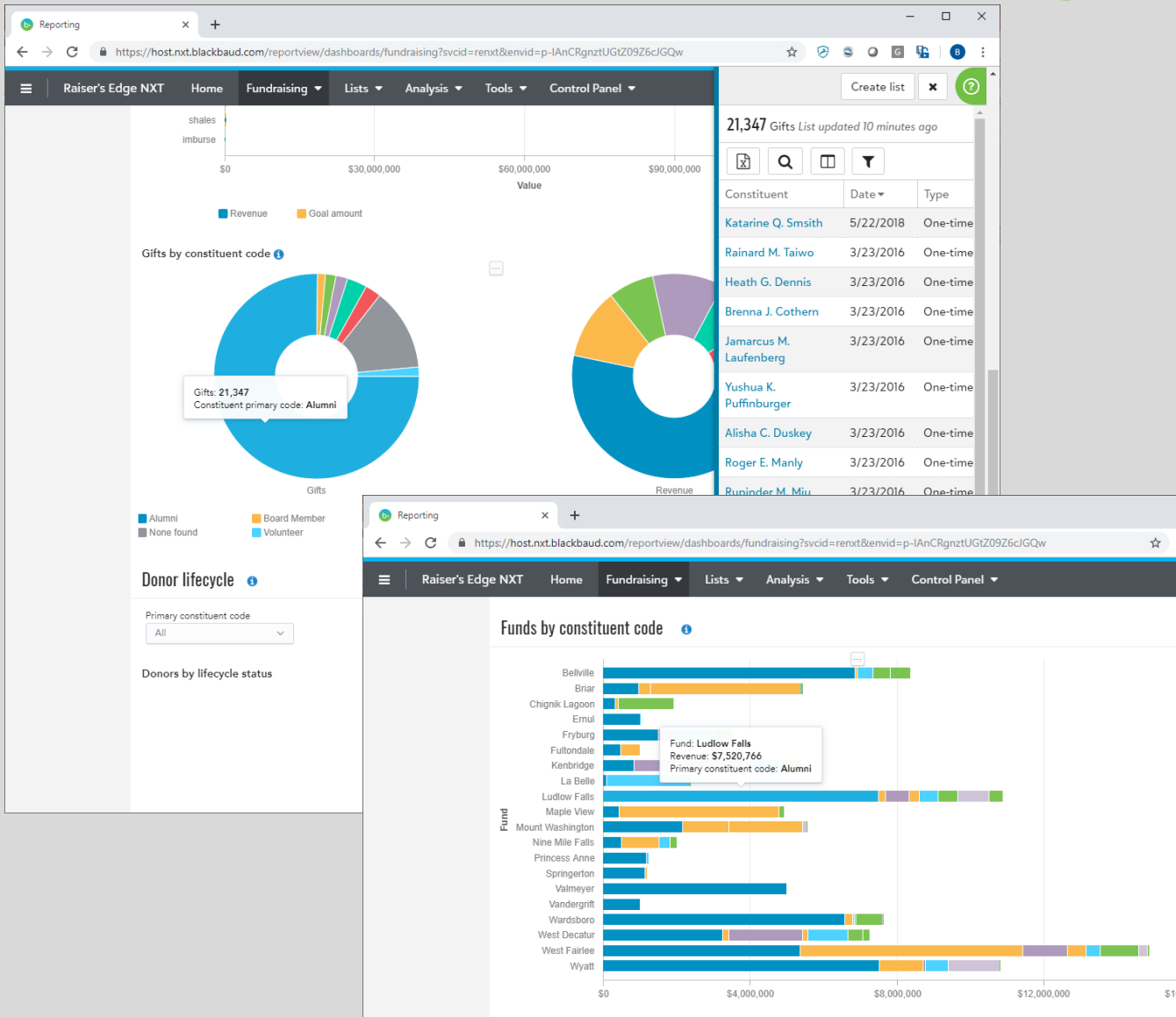
- “Current” is defined in Query with the second line of “Cons Code Date to blank”



“Former” codes?

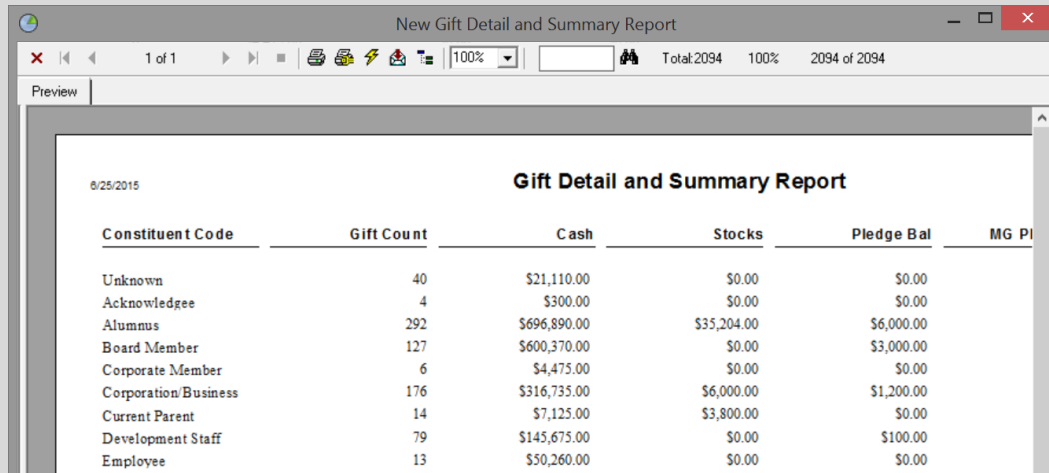
See www.billconnors.com/pages/resources/documents.php for my fundsvcs post on this topic re: board members

Constituent Code Reporting



Constituent Code Reporting

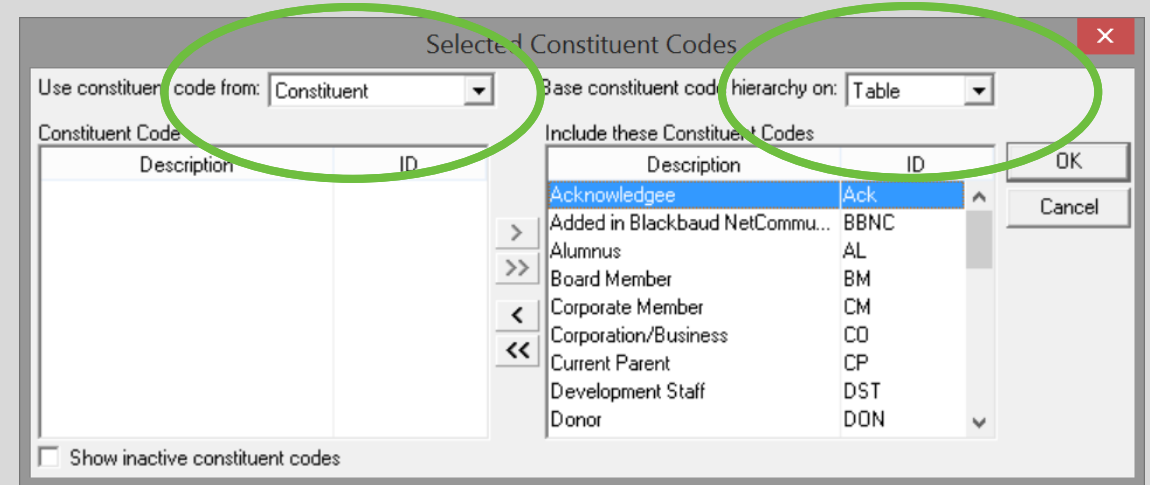
- Gift Detail and Summary Report
- Demographic and Statistical Reports
 - Statistical Reports
 - Comparisons and Summaries



8/25/2015

Gift Detail and Summary Report

Constituent Code	Gift Count	Cash	Stocks	Pledge Bal	MG PI
Unknown	40	\$21,110.00	\$0.00	\$0.00	
Acknowledgee	4	\$300.00	\$0.00	\$0.00	
Alumnus	292	\$696,890.00	\$35,204.00	\$6,000.00	
Board Member	127	\$600,370.00	\$0.00	\$3,000.00	
Corporate Member	6	\$4,475.00	\$0.00	\$0.00	
Corporation/Business	176	\$316,735.00	\$6,000.00	\$1,200.00	
Current Parent	14	\$7,125.00	\$3,800.00	\$0.00	
Development Staff	79	\$145,675.00	\$0.00	\$100.00	
Employee	13	\$50,260.00	\$0.00	\$0.00	



Selected Constituent Codes

Use constituent code from: **Constituent** Base constituent code hierarchy on: **Table**

Constituent Code	Description	ID
	Acknowledgee	Ack
	Added in Blackbaud NetCommu...	BBNC
	Alumnus	AL
	Board Member	BM
	Corporate Member	CM
	Corporation/Business	CO
	Current Parent	CP
	Development Staff	DST
	Donor	DON

Show inactive constituent codes

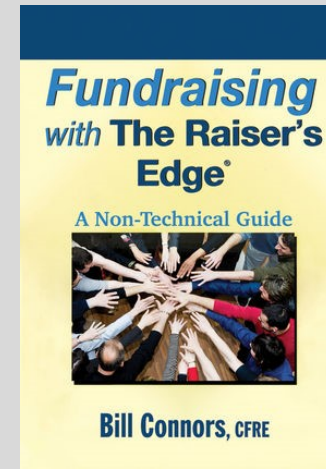
OK Cancel

THANK YOU!

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K-12
UC



LET'S CONNECT



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