



## Mastering Fundraising with the Raiser's Edge NXT Web View

bbcon 2022

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Independent Consultant and Trainer on Raiser's Edge

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# Slide deck

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[BillConnors.com/Resources](https://BillConnors.com/Resources)

# Thank you for the work you do



<https://www.nbcnews.com/news/us-news/section-sanibel-causeway-florida-destroyed-hurricane-ian-cutting-access-rcna49989>

# Session description and intent

The Raiser's Edge NXT web view is not new software to do things the old way. In this session, we explore how we can use the web view and its functionality to be modern fundraisers.

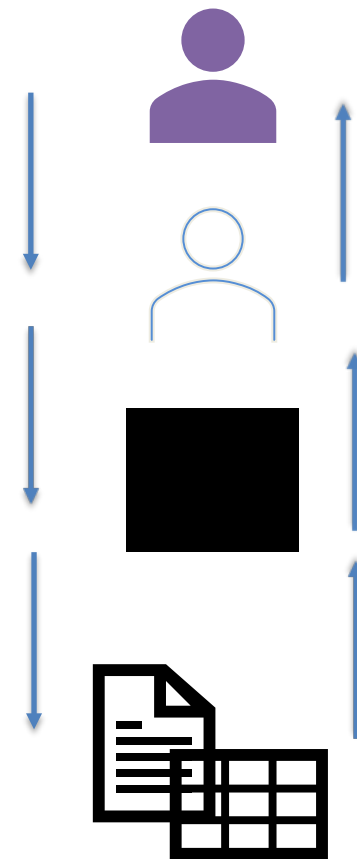
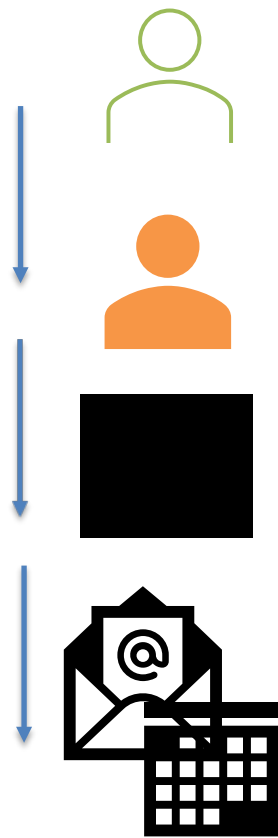
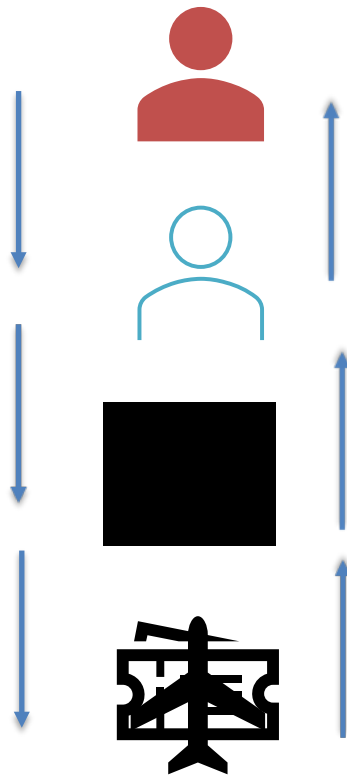
How do we as fundraisers reframe our approach to the software, and data in general, to do fundraising better?

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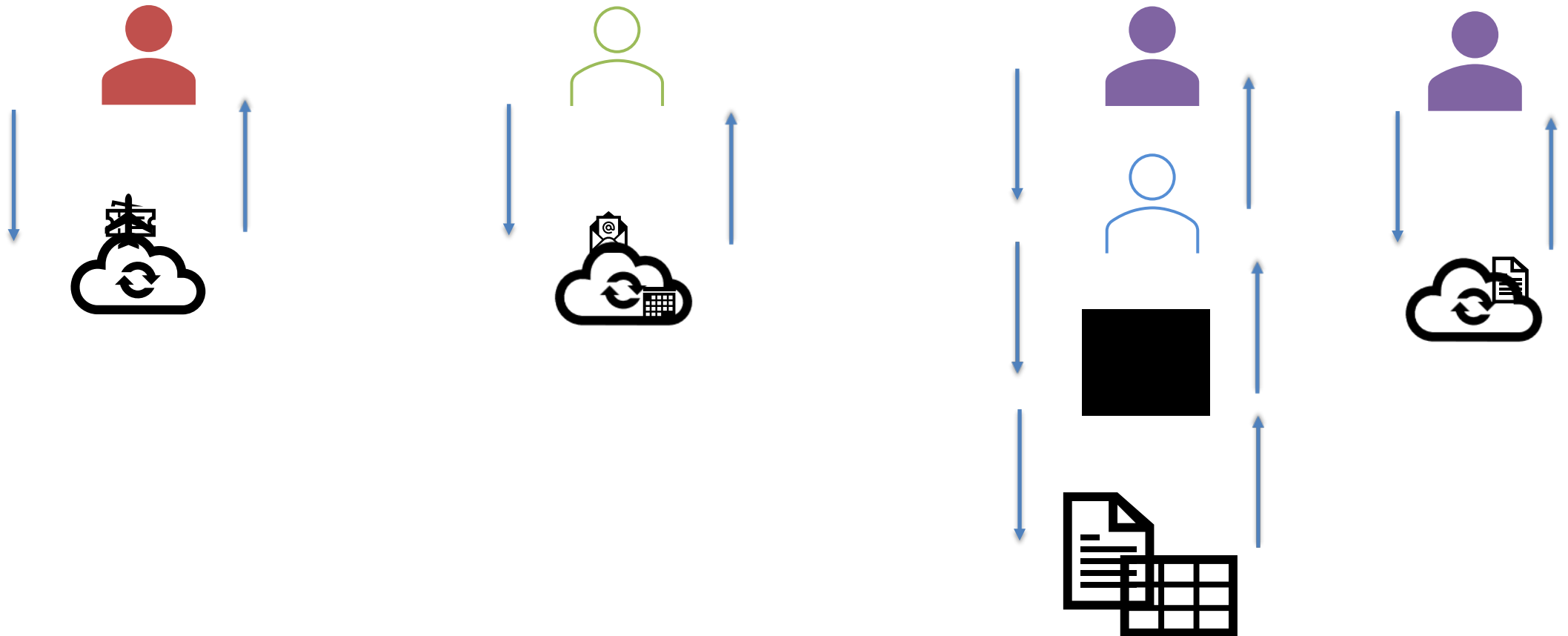
# Agenda

1. Quick but important introductory points
2. Recommendations for major gift officers, planned giving officers, mid-level donor fundraisers, corporate and foundation fundraisers, ... anyone who manages a portfolio
3. Recommendations for direct marketing fundraisers
4. Report of gifts for everyone

# The good ol' days...



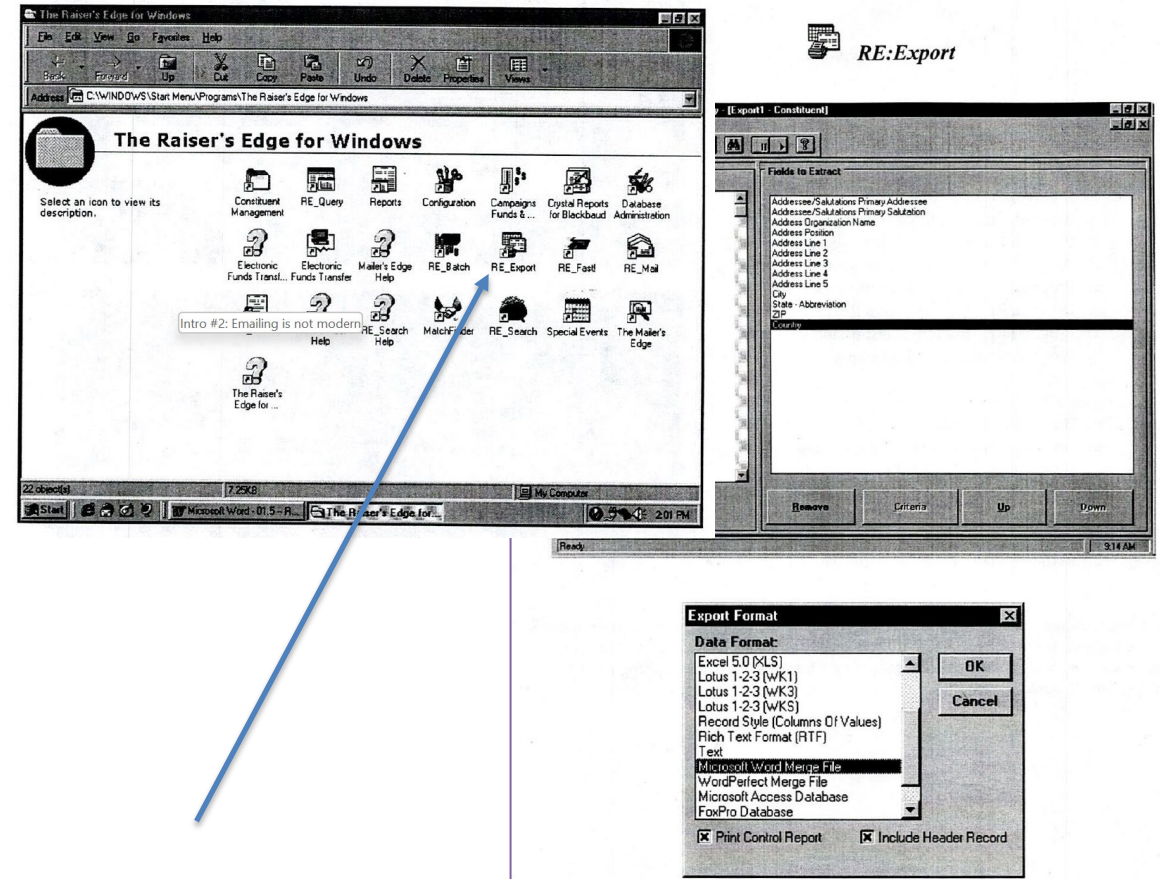
# Today...





# Intro #1: Exporting is not modern

- Exports are not
  - Secure
  - Up to date
  - Updatable, or require duplicate entry, if it even gets done
  - Drill-through-able
  - Easily sharable
  - Easily controllable
- Responding to “it’s easier...”





## Intro #2: Emailing is not modern


- Emails with prospect data are exports in an email with the same problems!
- *Is email really the best way to manage the most important work of fundraisers?*

Items: 459    Unread: 1

 **Inbox** 282



 Tasks

 RSS Feeds

 **Inbox** 226

 **Inbox** 3111

 **Gmail**

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# Intro #3: The web view isn't perfect, but...

*“Perfection is the enemy of progress.”*

- Winston Churchill

Also see my bbcon 2021 presentation: “Why Database Managers Should Use the Raiser’s Edge NXT Web View” (also at [billconnors.com/resources](https://billconnors.com/resources))

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# For portfolio managers

Each morning,

1. Get your coffee...
2. Check your email...
3. Then log into RE and get to work...

# First: Work Center Actions: Must do

The screenshot displays the Raiser's Edge NXT interface for the 'Work Center for Bill Connors'. The top navigation bar includes links for Home, Fundraising, Marketing, Events, Lists, Analysis, Tools, and Control panel. The main header shows 'Work Center for Bill Connors' with a 'Change fundraiser' link. Below this, a summary bar indicates 'Overview', 'Portfolio 94', 'Gifts 358', 'Actions 12', 'Opportunities 11', and 'Unassigned 11,268'.

The 'Actions' section shows a list of 12 actions, updated at 2:53 PM. The list includes columns for Constituent summary, Date, Status, Action summary, Action assigned to, Category, Constituent assign..., and Constituent ID. The first action is 'Face to Face Meeting' for Ms. Albertine Brigitte Defenbaugh, assigned to Bill Connors, with a date of 10/19/2022. Other actions include 'Face to Face Meeting' for Avamba, 'Face to Face Meeting' for Ms. Lizeth Jacinthe Deralph, 'Correspondence' for Jessamine Berniece Bookhardt, and 'Priorities' for Skivee.

On the right, a detailed view of the 'Task/Other - Face to Face Meeting' action is shown. It includes a 'High priority' badge, the action date '10/19/2022', and the constituent 'Ms. Albertine Brigitte Defenbaugh'. The 'Notes' section shows a note added via web view on 10/6/2022, requesting a gift of \$10k for the endowment fund. The 'Attachments' section shows no attachments found.

Annotations highlight key features:

- A red box on the left contains a menu with options: 'Add action', 'Edit action', 'Mark completed', and 'Copy action'. An arrow points from the 'Mark completed' option to the 'Action status: Open' filter.
- A green box on the right highlights the 'Action date' section, showing a date range selector set to 'This week' and buttons for 'Apply', 'Clear', and 'Cancel'.

Constituent summary	Date	Status	Action summary	Action assigned to	Category	Constituent assign...	Constituent ID
Ms. Albertine Brigitte Defenbaugh 7A Haiden Ave. Six Lakes, MI 48886 (575) 852-2208	10/19/2022	Open	Face to Face Meeting - Ms. Albertine Brigitte Defenbaugh 10/19/2022 12:00 PM	Bill Connors	Task/Other	Bill Connors (Relationship Manager)	54
Avamba 37 Swarthout Rd. Deerfield, KS 67838 (858) 735-2749	10/18/2022	Open	Face to Face Meeting - Avamba 10/18/2022	Bill Connors	Phone call	Bill Connors (Relationship Manager)	170
Ms. Lizeth Jacinthe Deralph 89 Wrin St. Saint Louis, MO 63196 (646) 576-3783	10/18/2022	Open	Face to Face Meeting - Ms. Lizeth Jacinthe Deralph 10/18/2022 12:00 PM	Bill Connors	Mailing	Bill Connors (Staff)	80
Jessamine Berniece Bookhardt 83 Kanokla Ave. Sykeston, ND 58486	10/17/2022	Open	Correspondence - Jessamine Berniece Bookhardt 10/17/2022	Bill Connors	Task/Other		6357
Skivee	10/17/2022	Open	Priorities - Skivee 10/17/2022 sadlka sdfkaskdfasdf asdg asg asd gasd gas g	Bill Connors	Task/Other	Bill Connors (Annual)	BCC

# Second: Work Center Gifts: Special thanks

The screenshot displays the Raiser's Edge NXT interface for the 'Work Center for Bill Connors' fundraiser. The main view shows a list of gifts, with a modal window open for a specific gift from 'Avamba'.

**Gift List:**

Constituent	Date	Type	Amount	Fund	Campaign	Appeal	Balance	Comments	Payment method
Avamba	10/17/2022	One-time gift	\$10,000.00	Mount Washington	Endowment	Proposal			Cash
Chatterpoint	10/17/2022	One-time gift	\$25,000.00	Ludlow Falls	Corporate Relations	Proposal			Cash
Ahsoka Tano	10/16/2022	Gift-in-kind	\$2,341.00	Catalyst Fund Wardsboro	Major Gifts 2022 sawing	burrowed neoclassicism			Cash

**Gift Details (Avamba):**

- Constituent codes: Major Donor 10/8/2004 - Present
- Fundraisers: Bill Connors
- Needs acknowledgement: Acknowledge
- Not posted: 6/13/2022
- GL post status: Needs receipt
- Receipt: Receipt

**Fundraising details:**

- Campaign: Endowment
- Fund: Mount Washington
- Appeal: Proposal
- Package: None selected

# Third: Work Center Needs Attention Cards

☰

Raiser's Edge NXT

Home

Fundraising ▾

Marketing ▾

Events

Lists ▾

Analysis ▾

Tools ▾

Control panel ▾

?

✕

Work Center for Bill Connors [Change fundraiser](#)

Overview

Portfolio 94


Gifts 358

Actions 14

Opportunities 11

Unassigned 11,268

Needs attention



**Tags! You're it!**

Use these tags to highlight key situations (possibly good or bad) to help cultivate the relationship and prioritize interactions.

[View all constituents with tags](#)

C

Chatterpoint

80 Candlebrush Ave.  
Oronogo, MO 64855  
(681) 130-3928

Higher giving potential

Lost donor

[See more](#)

Recommendation

Pay the constituent extra attention and look for opportunities to increase the next ask.

Add action

Dismiss

JK

Ms. Jeane Leroy Knickrehm

77 Knackstedt Ave.  
Orlando, FL

Higher giving potential

Lost donor

[See more](#)

Recommendation

Pay the constituent extra attention and look for opportunities to increase the next ask.

Add action

Dismiss

S

Skynoodle

748A Hilbrich Villas  
Preston, KY 40366  
(506) 857-7315

Higher giving potential

Lost donor

[See more](#)

Recommendation

Pay the constituent extra attention and look for opportunities to increase the next ask.

Add action

Dismiss

1

2

3

4

5

[View all constituents with tags](#)

Tags and Recommendations

To help focus on relationships that need your attention, **Raiser's Edge NXT** automatically listens to your active constituent records and tags them each night based on special situations such as upcoming birthdays or lapsed giving. With these tags, you can prioritize interactions and easily identify donors to engage with. For each tag, we recommend you respond appropriately to help cultivate the relationship.

At-risk, Lapsed, Lapsing, and Lost donor

Attended event

High wealth rating

Higher giving potential

New donor

No contact

No meeting

Overdue pledges

Recent gift

Recent wealth data

Recently assigned to fundraiser

Community

Knowledgebase

Case Central

Chat

Add action

Dismiss

# Focus: Work Center Portfolio

Raiser's Edge NXT Home Fundraising Marketing Events Lists Analysis Tools Control panel

## Work Center for Bill Connors

Overview **Portfolio 94** Gifts 368 Actions 14 Opportunities 11 Unassigned 11,268

95 Constituents last updated 2 minutes ago

Columns Export Find in this list

Filters: Birthdays Total giving First gift Interests Committees Custom field options Closing Codes Birthday Total giving First gift Interests Committees

Profile pi...	Constituent summary	Assigned to	Constituent codes	Lifetime giving	First gift	Latest gift	Greatest gift	Last action	Next action
	<b>Mr. Armani Reinhard Vidal</b> 39 Wedgemont St. Mobile, AL 36615 armani@gmail.com (959) 802-2383	Mr. Octavio Huston Juergens (Campaign) Mr. Ashton Wheeler Phan (Campaign) more	Board Member Beginning 12/13/2015 Board Member 04/01/2011 - 07/01/2013 more	\$6M	\$10,000 one-time gift 2/10/2014 Ludlow Falls	\$1,565 one-time gift 10/15/2015 Ludlow Falls	\$6,000,000 one-time gift 4/3/2015 West Fairlee	Meeting - Solicitation 7/21/2019   Mr. Ashton Wheeler Phan ✓ 8/21/2021	Meeting - Correspondence 4/17/2021   Bill Connors ⚠ Past due
	<b>Devify</b> 59 Sahuaro St. Ironwood, MI 49938 (365) 626-7054	Bill Connors (Relationship Manager)	Volunteer Beginning 01/17/2003	\$13K	\$150 one-time gift 3/15/2014 San Jon	\$35 one-time gift 3/8/2016 Ludlow Falls	\$5,000 one-time gift 1/30/2015 Ludlow Falls	Mailing - Correspondence 10/29/2013   Mr. Baldev Ralf Spilde, Ph.D. ✓ 10/29/2005	None
	<b>Mr. Tom Jepson Cail</b> 41 Pompton Croft Tulsa, OK 74193 (971) 667-1161	Bill Connors (Staff)	Donor Beginning 01/20/2003 Major Donor	\$7,824	\$10 recurring gift 1/6/2003 Gulf Breeze	\$10 recurring gift 12/31/2015 Gulf Breeze	\$2,709 one-time gift 3/15/2015 Ludlow Falls	Mailing - Correspondence 12/9/2012 ✓ 12/9/2004	None
	<b>Chatterpoint</b> 80 Candlebrush Ave. Oronogo, MO 64855 (681) 130-3928	Bill Connors (Relationship Manager)	Corporation\Business	\$19K	\$1,800 stock/property 1/13/2014 Briar	\$1,565 one-time gift 10/15/2015 Ludlow Falls	\$5,000 one-time gift 6/27/2014 Ludlow Falls	Mailing - Correspondence 10/25/2012   Mr. Baldev Ralf Spilde, Ph.D. ✓	None
	<b>Ms. Albertine Brigitte Defenbaugh</b> 7A Haiden Ave. Six Lakes, MI 48886 (575) 852-7268	Bill Connors (Relationship Manager)	Friend Beginning 01/01/2004 Friend 10/15/2003 - 11/07/2003	\$3M	\$4,500 one-time gift 1/8/2014 Gulf Breeze	\$3,500 one-time gift 12/31/2015 Bellville	\$3,000,000 one-time gift 12/23/2014 La Belle	Task/Other - Phone Call 9/9/2012 ✓	Mailing - Correspondence 1/29/2016   Mr. Baldev Ralf Spilde, Ph.D. ⚠ Past due

Prospect status: **A - Stewardship** - Past due at 751 days

Solicit codes: Do not phone at work

**Mr. Armani Reinhard Vidal**

**Fundraiser** **Gives Anonymously**

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

Membership

Individual  
Lapsed 12/2/2001

Spouse: Carlie Mohabir

Fundraisers: Mr. Octavio Huston Juergens, Mr. Ashton Wheeler Phan, Bill Connors

Mr. Vidal is hard of hearing; speak up when talking with him.

Menu

Constituent summary

...

Jan 07

na

52

la

17

Add action

Add note

Add opportunity

Assign fundraiser



# Focus: Work Center Opportunities

The screenshot displays the Raiser's Edge NXT interface for the 'Work Center for Bill Connors'. The 'Opportunities' tab is selected and highlighted with an orange box. Below the tab, a table lists various opportunities. A green box highlights the first row, 'General Proposal UHERO', and a purple box highlights the 'Last action' and 'Next action' columns for the same row.

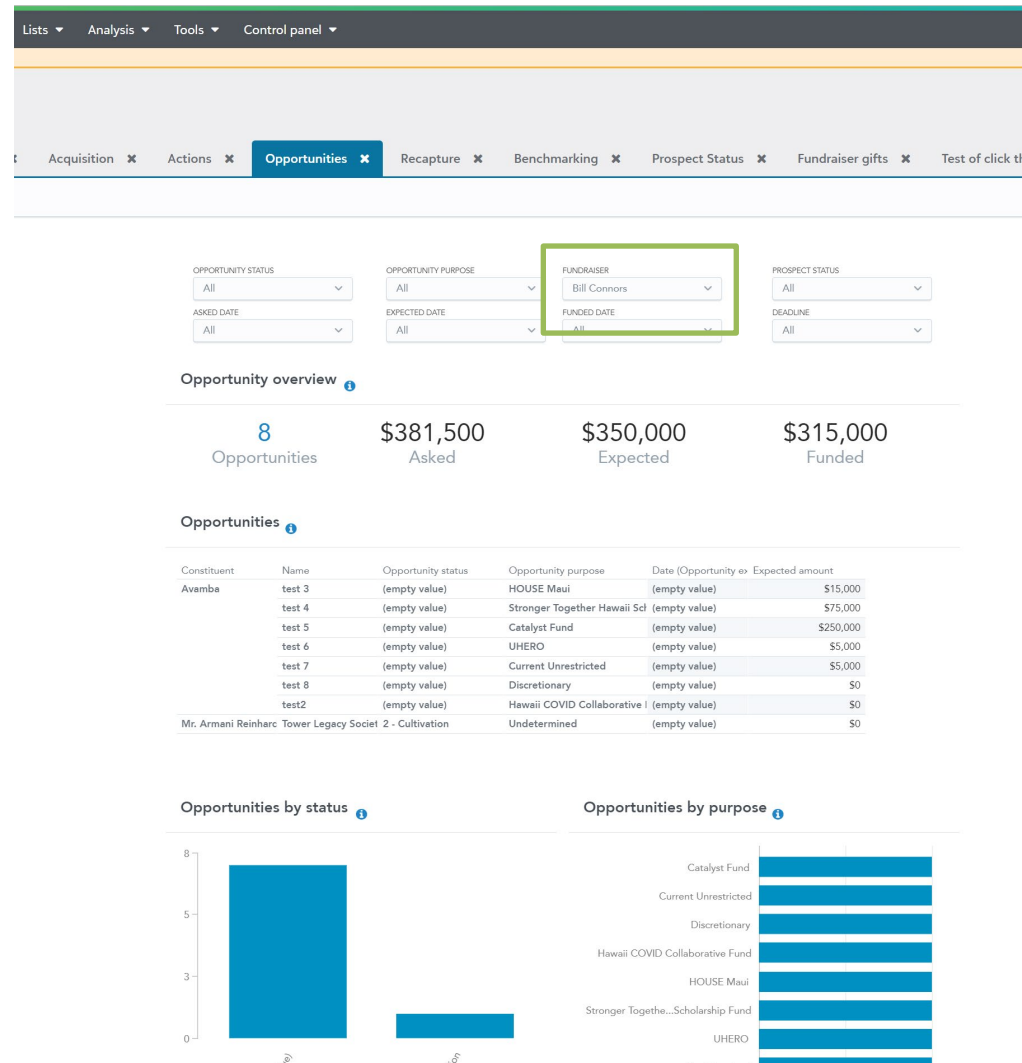
Opportunity summary	Constituent summary	Opportunity status	Ask	Expected	Funded	Deadline	Last action	Next action
General Proposal UHERO	Mr. Armani Reinhard Vidal 39 Wedgemont St. Mobile, AL 36615 armani@gmail.com (959) 802-2383	5 - Stewardship	\$2,000,000.00 1/1/2015	\$2,000,000.00 6/30/2015	\$2,000,000.00 4/3/2015	8/31/2015	Meeting - Solicitation 7/21/2019   Mr. Ashton Wheeler Phan ✓ 8/21/2021	None
Research Endowment Stronger Together Hawaii Scholarship Fund	Ms. Albertine Brigette Defenbaugh 7A Haiden Ave. Six Lakes, MI 48886 (575) 852-2208	4 - Negotiation	\$250,000.00 9/27/2001	\$200,000.00 7/1/2005			None	None
Grant Website Redesign Grant	Chatterpoint 80 Candlebrush Ave. Oronogo, MO 64855 (681) 130-3928						None	None
test2 Hawaii COVID Collaborative Fund	Avamba 37 Swarthout Rd. Deerfield, KS 67838 (858) 735-2749						None	None
test 3 HOUSE Maui	Avamba 37 Swarthout Rd. Deerfield, KS 67838 (858) 735-2749						None	None

The right sidebar shows the 'General Proposal' details, including the deadline (8/31/2015), status (5 - Stewardship), and a funding summary table.

Ask	Expected	Funded
\$2,000,000.00 1/1/2015	\$2,000,000.00 6/30/2015	\$2,000,000.00 4/3/2015

Note: This is a function of an optional module for RE, so not all organizations will have it.

# Portfolio manager: Opps dashboard



# Work Center summary

Gifts, Actions, and Opportunities tabs contain:

1. All the gifts/actions/opps assigned to the fundraiser (even if the fundraiser is not assigned to the constituent), *and*
2. All the gifts/actions/opps belonging to constituents in the fundraiser's portfolio (even if the fundraiser is not assigned to the gift/action/opp).

➔ The information that a portfolio manager is most interested in!

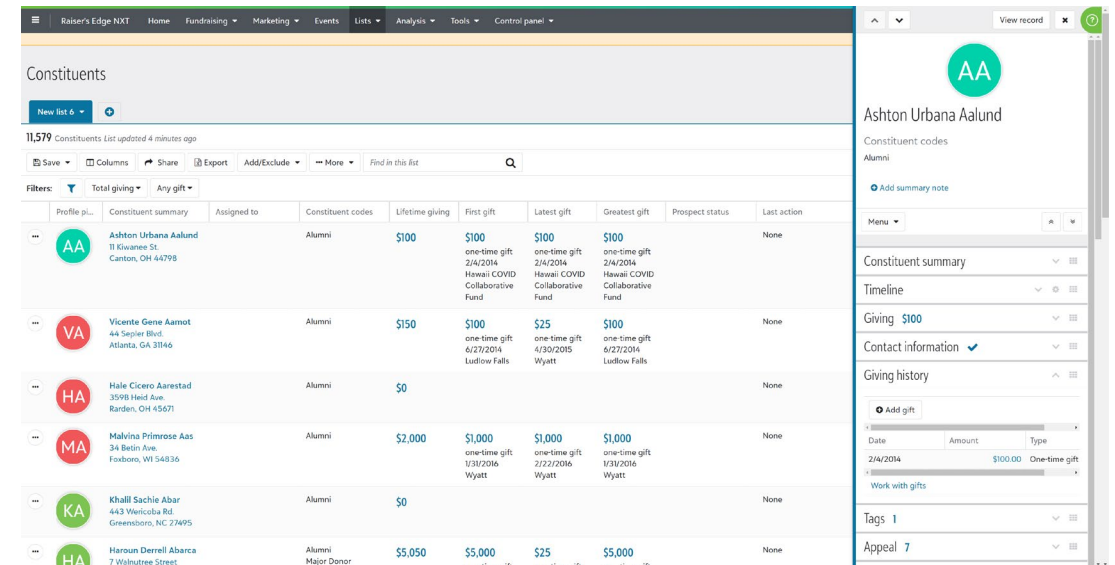
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# Portfolio manager focus

1. Constituent records
  - Including Add and Edit Actions, Notes and Opportunities
2. Work Center
3. Lists
4. Reporting, esp. Overview, Actions and Opportunities

# Direct marketing: Lists

- Lists
  - Intended for fundraisers
  - *Not* intended as the new Query or Export
- Good for
  - Recipients for web view Email
  - *Drafts* for hard copy mail or other email systems



The screenshot displays the Raiser's Edge NXT interface. The main table lists constituents with columns for Profile pic, Constituent summary, Assigned to, Constituent codes, Lifetime giving, First gift, Latest gift, Greatest gift, Prospect status, and Last action. The sidebar on the right shows details for Ashton Urbana Aalund, including constituent codes, a summary note, and a giving history table.

Profile pic	Constituent summary	Assigned to	Constituent codes	Lifetime giving	First gift	Latest gift	Greatest gift	Prospect status	Last action
AA	Ashton Urbana Aalund 11 Kiwanee St. Canton, OH 44708		Alumni	\$100	\$100 one-time gift 2/4/2014 Hawaii COVID Collaborative Fund	\$100 one-time gift 2/4/2014 Hawaii COVID Collaborative Fund	\$100 one-time gift 2/4/2014 Hawaii COVID Collaborative Fund		None
VA	Vicente Gene Aamot 44 Sepier Blvd. Atlanta, GA 30146		Alumni	\$150	\$100 one-time gift 6/27/2014 Ludlow Falls	\$25 one-time gift 4/30/2015 Wyatt	\$100 one-time gift 6/27/2014 Ludlow Falls		None
HA	Hale Cicero Aarestad 359B Heid Ave. Rarden, OH 45671		Alumni	\$0					None
MA	Malvina Primrose Aas 34 Betin Ave. Foxboro, WI 54836		Alumni	\$2,000	\$1,000 one-time gift 1/31/2016 Wyatt	\$1,000 one-time gift 2/22/2016 Wyatt	\$1,000 one-time gift 1/31/2016 Wyatt		None
KA	Khalli Sachie Abar 443 Wericola Rd. Greensboro, NC 27405		Alumni	\$0					None
HA	Haron Derrell Abarca 7 Walnutree Street		Alumni Major Donor	\$5,050	\$5,000 one-time gift one-time gift	\$25 one-time gift one-time gift	\$5,000 one-time gift one-time gift		None

**Ashton Urbana Aalund**  
Constituent codes: Alumni  
Add summary note

Menu

Constituent summary

Timeline

Giving \$100

Contact information

Giving history

Add gift

Date	Amount	Type
2/4/2014	\$100.00	One-time gift

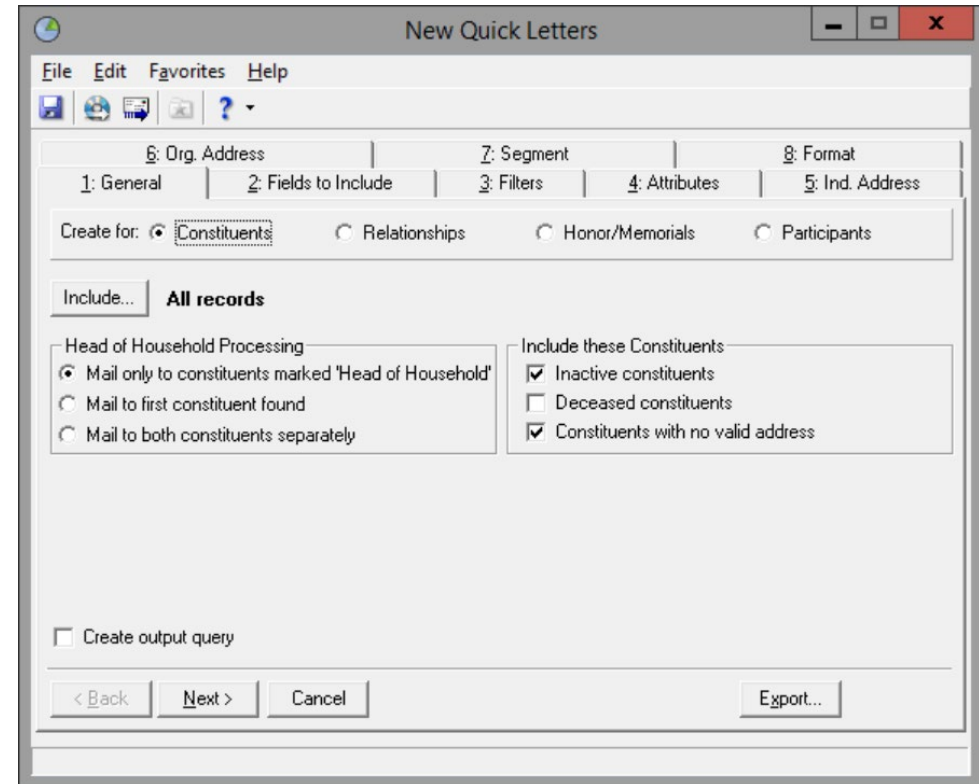
Work with gifts

Tags 1

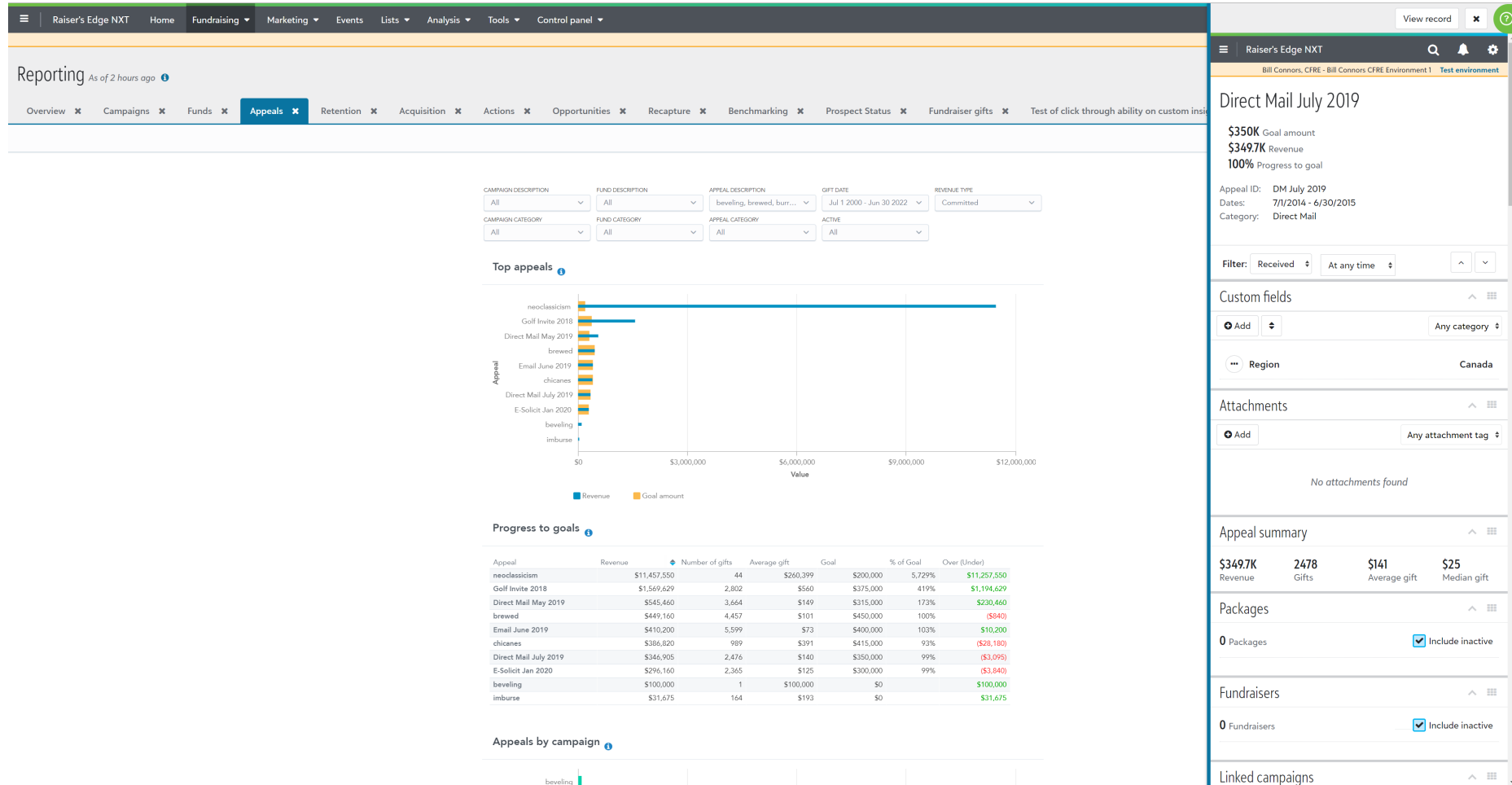
Appeal 7

# Direct marketing: Lists

- Do not export from Lists, especially for mailings
  - It's the wrong version of the name
  - It could be the wrong address
  - No head of household processing
  - Have you done all exclusions? etc.
- Use database view Mail, Query, and Export

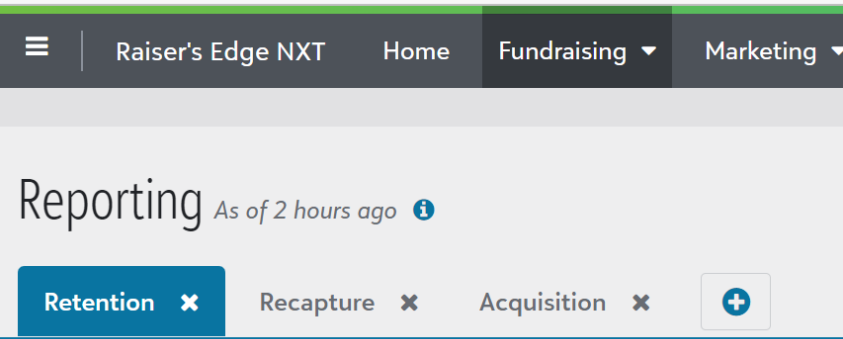


# Direct marketing: Appeals Reporting





# Direct marketing: Ret, Recap, Acq



	# Donors	Dollars
Retained	300	\$500,000
Recaptured	200	\$1,000,000
Acquired	100	\$250,000
Total	600	\$1,750,000
LYBUNT	75	\$300,000

Note: These definitions are a little *different than* those used in Overview > Donor Lifecycle and illustrated with the penguins: FY vs. rolling

Retained = gave this year and last fiscal year  
Recaptured = gave this year, did not give last year, but gave 2, 3 or 4 fiscal years ago  
Acquired = gave first time this year *or* this year and 5+ fiscal years ago

Illustration:						
	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6+
Giving	This FY	Last FY	2 FYs Ago	3 FYs Ago	4 FYs Ago	5+ FYs Ago
	22-23	21-22	20-21	19-20	18-19	17-18 and earlier
Retained	Gave	Gave				
Recaptured	Gave	Didn't	Gave or	Gave or	Gave	
Acquired	Gave	Didn't	Didn't	Didn't	Didn't	Gave or Didn't



# Direct marketing retention

## Year to date retention i

862	1.42%	\$184,207	0.70%	59,921
Retained donors	Donor retention rate	Retained revenue	Revenue retention rate	LYBUNT donors

## First year donor retention (Year to date) i

134	0.55%	\$14,624	0.13%	24,292
Retained donors	Donor retention rate	Retained revenue	Revenue retention rate	LYBUNT donors

Performance to date

Opportunities to improve

# Direct marketing recapture

Year to date recapture 

37

Recaptured donors

0.1%

Recapture rate

\$6,738

Recaptured revenue

0.2%

Revenue recapture rate

46,137

Recapturable donors

Performance to date

Opportunity to  
improve

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# Direct marketing focus

1. Lists, but no exporting
2. Email
3. Reporting
  - a. Overview
  - b. Appeals
  - c. Retention, Recapture, Acquisition
4. But all mailings should be generated from the database view

# No more emailed daily gift reports!

The screenshot displays the Raiser's Edge NXT interface. The top navigation bar includes links for Home, Fundraising, Marketing, Events, Lists, Analysis, Tools, and Control panel. The main content area is divided into two sections: a list of gifts and a detailed view of a specific gift record.

**Gifts List:**

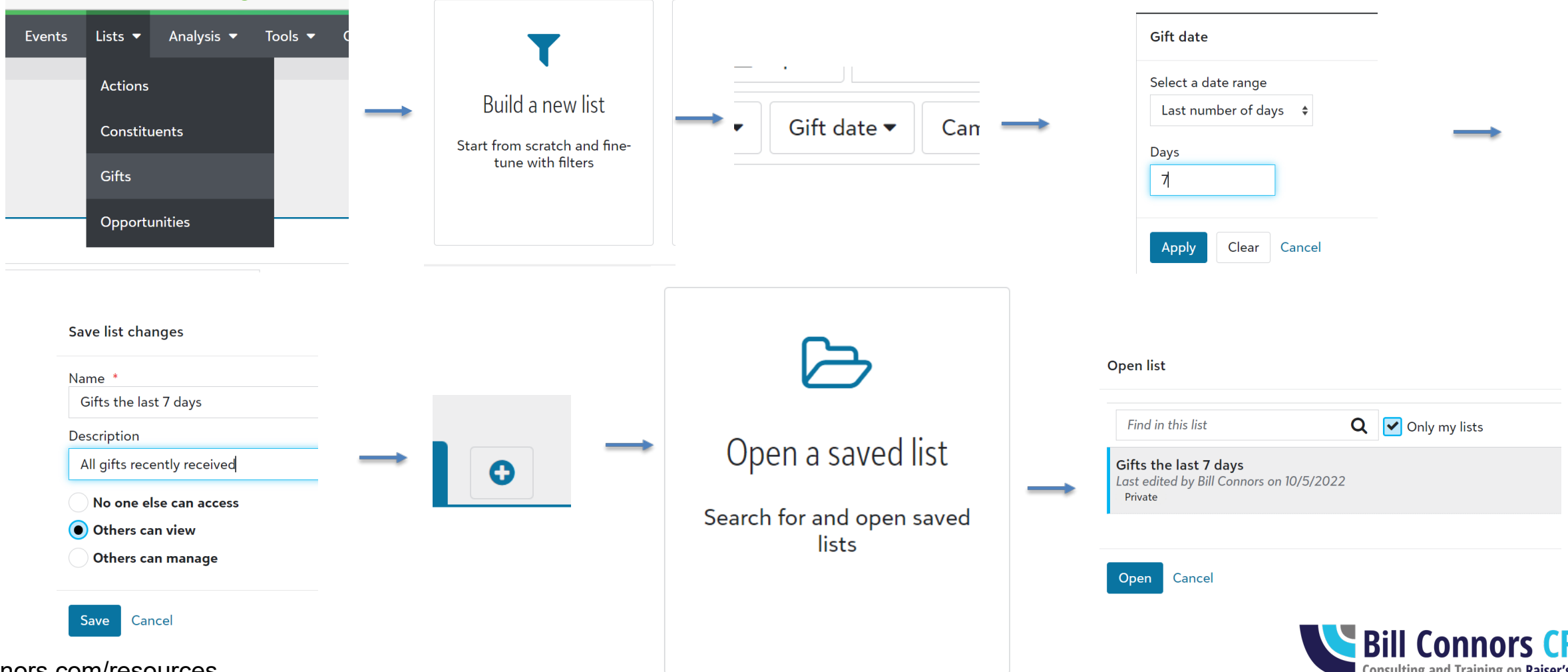
- Header: Gifts
- Filters: Elbra Gifts\*, Gifts in the last 7 days
- Count: 28,845 Gifts List updated about one minute ago
- Actions: Save, Columns, Share, Export, Delete, Find in this list
- Filters: Gift amount, Gift date, Appeal, Campaign, Fund, Gift type
- Table columns: Constituent, Date, Type, Amount, Fund, Campaign, Appeal, Balance, Comments, Gift subty

Constituent	Date	Type	Amount	Fund	Campaign	Appeal	Balance	Comments	Gift subty
Avamba	10/17/2022	One-time gift	\$10,000.00	Mount Washington	Endowment	Proposal			
Chatterpoint	10/17/2022	One-time gift	\$25,000.00	Ludlow Falls	Corporate Relations	Proposal			
Bob Smith	10/17/2022	One-time gift	\$100,000.00	Ludlow Falls	Major Gifts 2022	Personal Ask			
Andy Connors	10/17/2022	Planned gift	\$100,000.00	Catalyst Fund	Major Gifts 2022	Personal Ask			
Ahsoka Tano	10/16/2022	Gift-in-kind	\$2,341.00	Catalyst Fund Wardsboro	Major Gifts 2022 sawing	burrowed neoclassicism			Computer

**Gift Record Detail:**

- Header: Chatterpoint
- Constituent codes: Volunteer 2/1/2000 - Present
- Fundraisers: Bill Connors
- Actions: Add summary note
- Menu: < >
- Contact information: Edit, Include inactive
- Addresses: View details, 23 Eulitz Vale
- Acknowledgements and receipts: < >

# Gifts List Setup



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**Thank you!**

**Bill Connors, CFRE**

Independent Consultant and Trainer on Raiser's Edge

415.377.9197

[bill@billconnors.com](mailto:bill@billconnors.com)

[billconnors.com](http://billconnors.com), especially the Resources page, which includes a  
copy of these slides