

The Countdown is On: Getting You and Your Organization Over the Finish Line to the Raiser's Edge Web View

Bill Connors, CFRE, bCRE-Pro

*Independent Consultant and Trainer
on Raiser's Edge NXT*



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Slide Deck & Project Plan Template

You can download the slide deck and project plan template – *anonymously, no login or forms to fill out* – at

BillConnors.com/Resources



Let's be clear about a few things
before we begin....

9/15/27 End of Database View, OLX, BBNC

On September 15, 2027, support for Raiser's Edge NXT database view and related database view-dependent functionality will end. After this date, customers will access their fundraising operations and new capabilities through the Raiser's Edge NXT web experience and SKY API®, creating a connected ecosystem that extends fundraising workflows into third-party solutions, including AI-powered productivity tools.

Email from Blackbaud September 1, 2026

Database view features **will remain enabled** until the database view is fully retired.

Blackbaud Raiser's Edge NXT Product Update Briefing May 5, 2026

What This Session Is About



1h ·

Top contributor

The Raiser's Edge Users Group Support Forum

Private group · 9.8K members



My capacity

(like others, I'm sure) is at it's limit (I'm actually on "vacation" now but like to keep up with the group) and noting all the changes, testing, and implementation of RE WV features has been a huge challenge - not including the fact that we're deep in annual budget planning, event season, and year end planning.

...

Post August 19, 2026 - <https://www.facebook.com/groups/REUserGroup>

Between 9/1 and 9/18 (3 weeks)

- The 9/15/27 announcement email
- Two webinars and another one after that (9/8, 15, and 22)
 - Including a 20-page 9/8 Q&A follow-up document
- Eleven RE NXT blog posts and comments (as of 9/21 plus at least 4 this past week)
- A new Transition Navigator with at least 17 links
 - Including a 24-page P&P guide – just for gifts
 - A “Transition Guide” *and* a “Transition Checklist”
- Two further Transition Leader documents totaling 17 pages of things to read, learn, know and do
- A Customer Success newsletter with 15 links in it
- At least 5 marketing emails about AI, bbcon, and RE
- Dozens of email notices about Idea Bank updates
- Countless discussions and comments on the Blackbaud Community and Facebook group

9/15/27 End of Database View, OLX, BBNC

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Email from Blackbaud September 1, 2026

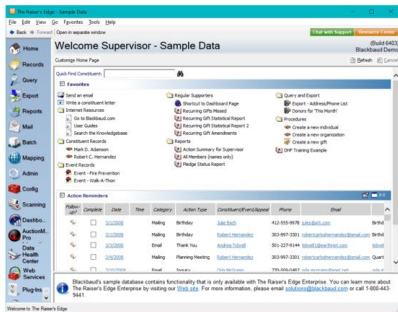
Database view, Blackbaud NetCommunity, Online Express, and related database view plug-ins remain supported through September 15, 2027.

Blackbaud Raiser's Edge NXT InsideTrack webinar September 22, 2026

Terminology

“Raiser’s Edge”

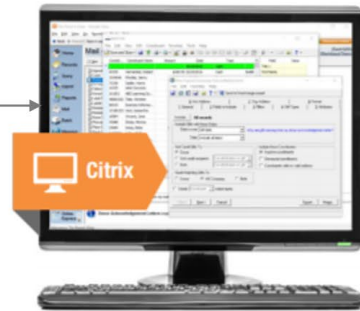
The Raiser’s Edge version 7



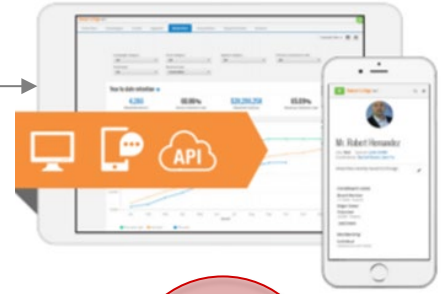
Raiser's Edge NXT

Database View

Web View



.. Raiser's Edge NXT ..
Or “Raiser’s Edge”



“Unified View”



9/15/27 Should Not Be Like This

[ORGANIZATION] Raiser's Edge Project Go-Live Countdown

Go-live date: Monday, April 10! *(on schedule)*

Associated documents:

[Project Plan](#) (ref: page 55 and 57 for "go-live" process)

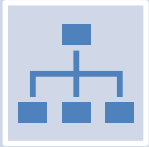
[Project Timeline Detailed](#) (ref: Major Project Milestones tab)

Conversion schedule in Excel agreed to with Deepa

Day	Date	Tasks
Week of March 27 2 weeks until go-live		- Workgroup final review of t [ORGANIZATION] review an - No SS fundraising entry - All gift entry saved for re-en - Practice gift entry, acknowl
Monday	3/27	Final Run delivered from B
Tuesday	3/28	- Integration Mtg & IT/Adv M - Bill and Wanda start conver
Wednesday	3/29	Continue remote conversio
Thursday	3/30	Continue remote conversio
Friday	3/31	- Blackbaud.com accounts re - Completed wee
Week of April 3 1 week until go-live		- Bill Connors onsite and Jason - Vetting of final conversion - Prep of final database for go-live (e.g., Security, Configuration, Reports, etc.)

Day	Date	Tasks	VA
Thursday	4/6	"Before Go-Live" Clean-Up	
Friday	4/7	"Before Go-Live" Clean-Up, IOM Run - Technical Tasks: Citrix Install on DB View User's Computers, Citrix accounts created & tested	
Saturday	4/8	If needed, completing tasks above, starting "ASAP After Go-Live" clean-up	
Sunday	4/9	If needed, completing tasks above, starting "ASAP After Go-Live" clean-up	
Week of April 10 Week of go-live		- Bill Connors onsite and Jason available full-time remotely to help with... - Go-Live! - Bill and project leadership to conduct Staff training - All staff should plan to have work to do in RE this week and time to do it so they can immediately begin using their training - Bill and project leadership to assist users in going live - March-April gift entry catch-up	
Monday	4/10	Go-Live!* - End-User Training - Database View (all day) - Staff using RE GO LIVE PARTY!!!	
Tuesday	4/11	End-User Training - Database View 1/2 Day	

Responsibility



The person in the role of “database manager,” regardless of their actual title, has primary responsibility for managing this transition for your organization IMHO. Regardless, ensure you have a “Transition Leader” and they have notified Blackbaud who they are.



If you “don’t have time,” you need to make time. If you can’t, you need to talk with your supervisor. You might need to learn how to say “No” or “Not now” or “To do that I need...”



Agree or not, like it or not, this is real, it needs to happen, it’s going to happen at some point, you need to be ready.

Best Blackbaud Resources

1. “Operational” Emails from Blackbaud
2. Product Update Briefings (next: Nov 17-18)
3. RE NXT Blog posts on the Blackbaud Community
4. InsideTracks, then Town Halls
5. Resource Center and Transition Navigator
6. Blackbaud University short videos (a word about training...)

More info about these resources and links in the August and September newsletters at

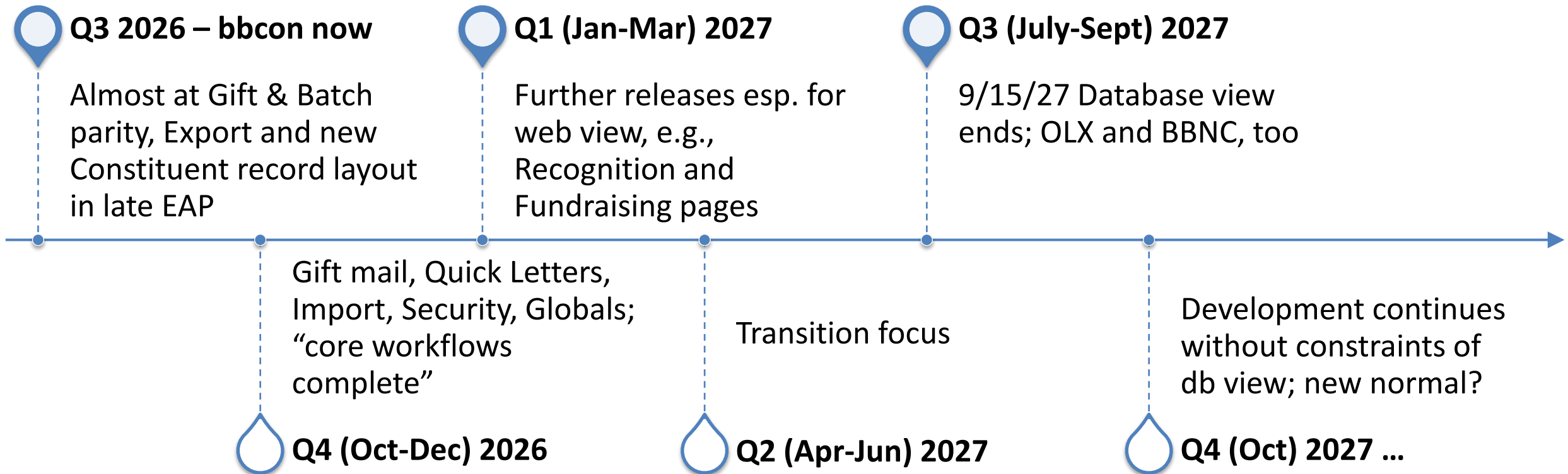
<https://billconnors.com/resources/>

Raiser's Edge NXT Roadmap

AVAILABLE NOW	BY END OF YEAR 2026	COMING SOON
FUNDRAISING INTELLIGENCE Intelligent Tags Lapsing, newly capable, ready to upgrade — the segment is already built. Chat for Blackbaud AI Plain-language answers you can narrow and challenge. Start from the Prompt Library. Portfolio and dashboards Prospect Insights and Pro, home page dashboards ENGAGEMENT Recognition programs – Legacy Plus action record enhancements and the Cultivation Assistant (EAP). ONLINE GIVING Forms and portal Standard and Optimized donation forms with real-time receipting, Online Membership and constituent forms, portal enhancements, Consent Management. Abandoned Donation Reminders Bring donors back to finish the gift. Automated receipting Receipts issued automatically as gifts come in. GIFT PROCESSING Grid View Batch High-speed gift entry with smart defaults and templates, plus Batch Control and Validation Report. Campaigns, Funds and Appeals Modern dashboards across funds and appeals. Recurring gifts and pledges Automated recurring gifts, UK and AUS Direct Debit, pledge enhancements. DATA MANAGEMENT Online Data Review Constituent, event registration and membership forms Query, lists and APIs Query enhancements, Managed Lists, Needs attention queues, dynamic lists composable insights, change log, and bulk import APIs.	FUNDRAISING INTELLIGENCE Donor Levels Define Annual through Transformational once. Every dashboard, list, tag and AI answer reads the same definition. Status Mapping Prospect and opportunity statuses map to lifecycle stages. Set what counts as open, closed or excluded, and auto-advance on a qualifying action. Giving Analysis Exclude event fees and non-gift revenue. Define how soft credits, matching gifts and split gifts count toward totals. DATA MANAGEMENT Import: Constituent and Gift One experience, async processing, targeted error handling, gifts straight into batch. Constituent import is live; gift import follows. Lays the foundation for Global Change. Data Health Address Accelerator as a tile, plus an assistant running Address, Email and Phone Finder. Query and Export, together Single Row Query — find, filter and output in one step, with scheduling. Existing exports migrate CONSTITUENT MANAGEMENT Constituent Tabbed View Tabbed layout that keeps your place, faster loads, streamlined editing. Additional constituent fields Relationships, bio and contact, opportunities, plus Individual/Organization conversion. ADMINISTRATION & CONFIGURATION Permissions All permissions in one place, Settings Business rules and user options	Ships in roughly one to two quarters. ENGAGEMENT Volunteer History, roles, hours, status and recognition on the constituent record. Membership Full lifecycle — benefits, participation, renewals and upgrades, plus membership processing. GIFT PROCESSING Grid Batch · (October) All gift linking and application workflows — tributes, opportunities, memberships, events, benefits, matching gifts. Defaults gain splits, custom fields and one-to-many. Planned Gifts, Matching and Benefits · (October) Edit planned gift detail and apply transactions. Benefits and matching gifts across gifts, memberships, events and appeals. Gift Edits and Adjustments · (October) Editing across all gift types, an adjustments tile with history, centralized notes, stock selling. Grid Batch · (December) Import gifts into batch, global field update, manual payments, search by ID, tabbed and custom field improvements, Direct Debit migration. COMMUNICATIONS Mail Receipts, Acknowledgements, Reminders and Quick Letters FUNDRAISING INTELLIGENCE Goals and Performance Set a goal, watch progress — not a report. Needs Attention flags what is off track, benchmarked against peers. Portfolio — Goal Management Goals scoped to the org, a team, a fundraiser, campaign, appeal, fund or event. ENGAGEMENT Event Management Modern registration form, copy an event, copy fees and forms, participant custom fields, event capacity. Over 1,000 idea votes. Recognition and engagement strategies Recognition Programs, Lifetime and Loyalty recognition, plus Action Tracks in Portfolio. ONLINE GIVING Fundraising Pages A branded giving page with live goal tracking — one embed or fully hosted. Donor Portal Self-service for giving history, recurring gifts, registrations and memberships. DATA MANAGEMENT Import Additional Import Types Search enhancements Wildcard, expansion of filters Query Web fields supported Data Health Data Health Agent COMMUNICATIONS Mail merge Mail merge is coming back. Receipting, consolidated receipting, acknowledgements and pledge reminders in one place. Communication History and Consent Track all donor history and respect their consent on communications

Blackbaud's Overall Plan

(as I understand it as of this moment on bbcon Day 1)



Your Plan



Last year I said “don’t plan” because we didn’t know enough, instead I provided day-to-day strategies for implementation



This year: make and implement a *flexible* plan



E.g., for the first time ever, we’ll soon be able to do mailings in the web view: Query, Export, QL, and gift mail; if you’ve done nothing to little with gifts in web view to date, that was fine, but...



Make a list OR just do it!

RE Projects You Could Work On This Year

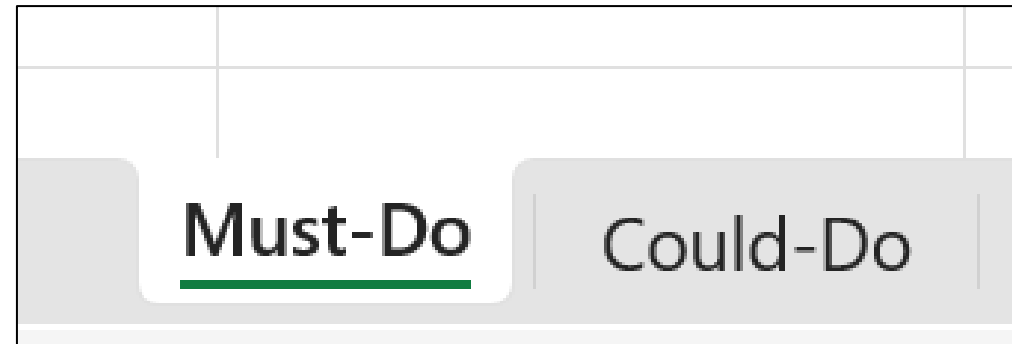
1. Database view tasks you do now that need to be moved
2. Database view only capabilities you don't yet use
3. Capabilities shared in both db and web views you don't use
4. Capabilities in web view only that you don't yet use
5. Data cleanup
6. Buying and implementing new things
7. Raiser's Edge NXT Complete Premium features
8. Documentation

RE Projects To Prioritize First

1. Database view tasks you do now that need to be moved
2. ~~Database view only capabilities you don't yet use~~
3. ~~Capabilities shared in both db and web views you don't use~~
4. ~~Capabilities in web view only that you don't yet use~~
5. ~~Data cleanup~~
6. ~~Buying and implementing new things~~
7. ~~RE NXT Complete Premium features~~
8. ~~Documentation~~

Plan Idea

- Spreadsheet
 - Sort by any column
 - Easy to move rows
 - Simple
- Two tabs



An Excel spreadsheet of a simple plan template is available at <https://billconnors.com/resources/> (again free, anonymous, no info required)

Must-Do Work for the End of the Raiser's Edge Database View

Database View End Date: September 15, 2027

Our Internal Deadline: August 15, 2027

Focus: Tasks still done in the database view

Gray rows are projects/events with immovable dates, white rows are tasks to be completed any time before Internal deadline.

					Hint: Enter the task/projects with the primary task worded first so this column can be sorted by topic if desired	
Start Date	Due Date	Date Completed	Responsible	User Affected	Task/Project	Notes
				Beth	Recurring Gift charging from db view to web view	Move as so
	10/31/26		Beth	Beth	Daily batch entry to web view	Been waitin
				Beth	Stock gift entry to web view	
				Beth	Address updates to web view	Waiting for
				Beth	Ack export from db view to web view	Waiting for
				Tyrone	Newsletter from Quick Letters in db view to QL in web view	Waiting for
				Tyrone	Annual report reports to web view	Move asap
11/23/26	01/15/27	End of Year Gift Processing is the Focus				
5/17/2027	05/21/27	Graduation Week: all hands on deck				
7/1/2027	07/31/27		Nyiema	Nyiema	Import of new students and parents, roll over of graduating students and parents	
7/5/2027	07/16/27		Tyrone	Tyrone	Tyrone out on vacation	
7/15/2027	08/01/27		Tyrone	Tyrone	If web view AddressFinder hasn't improved and been moved to web view yet, we're forced to do it in web	Looking for

Must-Do Tab Tips

- Start focus with what's done in the database view
- Hard to wrap your mind around “everything we do”
 - Rather than focus on tasks, focus on people
 - Manage the individuals rather than tasks in a vacuum
 - What do they DO
 - What do they NEED/REQUEST (this will duplicate what others do, but that provides a safety net)
- Create it by interviewing *users*, not *brainstorming tasks*

Must-Do Tab Tips

- Users are not good at remembering what they do, they just do it. Revisit, revisit, revisit with everyone
- Get ideas from Blackbaud's Transition Navigator
- Go through database view function by function (e.g., OLX forms)
- Incorporate department events, holidays, busy times, vacations, etc.
- Avoid hockey stick project management
- Be flexible, a lot more is coming!



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Could-Do Tab

Could-Do Tasks and Projects to Make the Most of Raiser's Edge NXT					
Focus 1: Improvements we can make in the use of the web view					
Focus 2: Improvements we can make in the use of RE NXT in either view					
Focus 3: Other RE projects (cleanup, documentation, new tools, process improvements, etc.)					
Priority	Responsible	Task/Project	Notes		
		Implement RE NXT AI			
		Implement Consent to work with our Solicit Codes	https://community.blackbaud.com		
High		Fundraisers trained on Work Center			

Could-Do Tab Tips

- The other 7 types of projects from the RE Projects slide
- Seeing requests placed in writing here is of great comfort to those in leadership and your users; it eases pressure on you when you can truthfully say, “it’s on our list, it’s in our plan, we’ll get to it as soon as we can”

Thoughts on Other Tasks/Projects

- Raiser's Edge Blackbaud AI implementation
- New web view features like Recognition
- Consent

Something does not have to be perfect to be incredibly useful.

Yerba Buena Financial Partners email September 14, 2026

Planning Reminders



We still don't know exactly what's coming when, but we have enough and know enough to make serious changes we couldn't last year



You do some things once a year; you've got just shy of a year from now before this happens, so look backwards a month and pay attention going forward



You can either try to adopt early and provide useful feedback to Blackbaud about what's not working for you, or you can wait and lose that opportunity

Timing Your Plan

Oct – Nov 2026: Plan, plan, plan

- Not about data migration and moving data and parameters
- It's a process migration – do we know how to, is it set up, have we practiced it, are we using it?
- Speak up immediately to give Blackbaud time to react and do it, don't wait until next summer and start complaining

Dec 2026 – Jan 2027: EOY gift processing, holidays, time off

Timing Your Plan

Feb – June or July 2027: Best time to do the work

- Schools consider end of school year busyness

Summer 2027

- Consider vacation planning
- Schools consider new parents and students imports and graduates rollover

Late Summer 2027: Consider fall 2027 fundraising ramp-up

Late Summer 2027 As We Get Close to Sept. 15

- Consider existing settings in the web view and revisiting them
- *At this point*, there's nothing I know of that we'll need to capture from the database view that is going to be lost that we might want to keep screenshots or exports of, but consider that as it gets closer (e.g., Import parameters? Output parameters not replicated, such as Reports or Mail?)

Documentation

- Update your documentation as you go, but...
- Do not waste your time documenting every click and button and step. You are not the Blackbaud Help or Documentation team.

Policy and Procedure Documentation

In addition to chapter 8 of Bill's [book](#) about Raiser's Edge (pages 211-215):

- Blackbaud Conference presentation available on [YouTube](#)
- Policy and Procedure Documentation (bbcon presentation slides) [DOWNLOAD](#) 
- Documentation Example 1 — Process for Generating Direct Mail Files [DOWNLOAD](#) 
- Documentation Example 2 — Annual Report Process [DOWNLOAD](#) 
- And see Chapter 8 and Appendix C of Bill's [book](#) on Raiser's Edge

Other Tasks

- Keep checking in with *all* staff...“Okay, it’s X months to the database view going away, did you do, are you about to do, anything in the database view?”
- Keep doing in the database view what’s best done there, advocating to Blackbaud in the meantime, until we have no choice (e.g., AddressFinder)

Remember: You Are Not Alone



Blackbaud Community for Raiser's Edge NXT



Raiser's Edge group on Facebook ("The Raiser's Edge Users Group Support Forum")



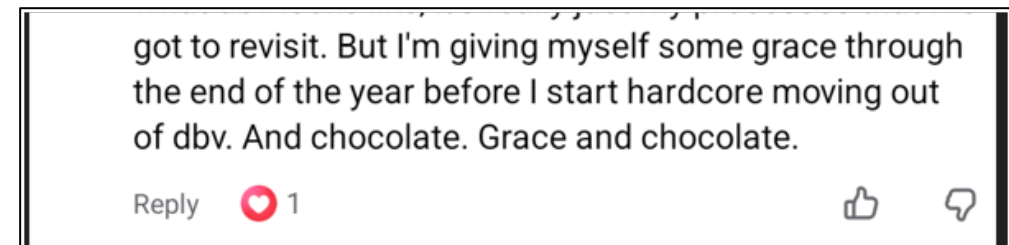
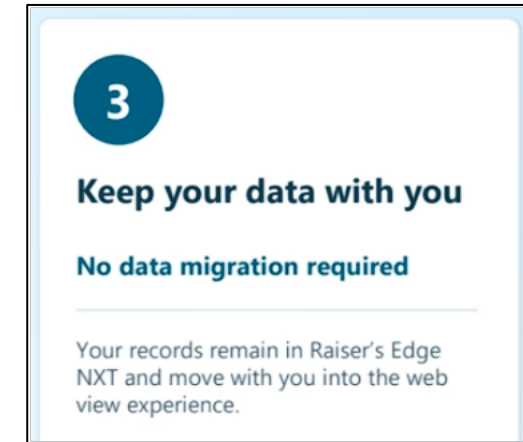
Connecting with other users at Blackbaud events, on- and offline



Consultants offering their services, websites, webinars, and user groups (but don't wait until the last minute to book their services, they'll be fully booked!)

Finally

1. Focus on moving database view tasks
2. Worst case
3. Have grace. And chocolate. Grace and chocolate. And maybe ice cream.



Thank you!

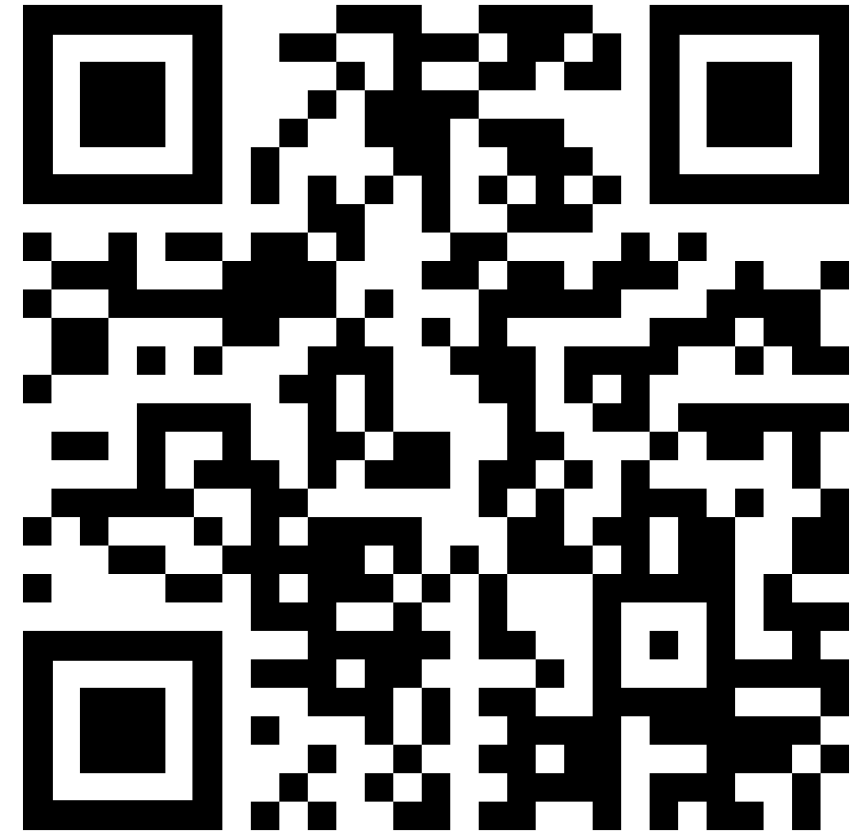
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Free documents that do **not** ask you to give your
contact information are available at
billconnors.com/resources, including these slides.



Thank you!

We welcome your feedback
on this session and the speakers in the
bbcon conference app!

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