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Raiser's Edge NXT Pricing and Records: To Delete or Not Delete?

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Blackbaud pricing for Raiser's Edge NXT is based on primarily two variables:

1. What Raiser's Edge NXT "package" you select
2. How many constituent records are in your database

The package determines what products (such as Raiser's Edge modules) and services (such as analytics and "data enrichment services") are included. Picking the right package is an important decision, although not the topic of this whitepaper.

The number of constituent records in your database seems fairly straight-forward, however. We have what we have in the database; it is what it is. But pricing based on the number of records raises the question: Can we, should we, delete constituent records from our database to get the price down? This paper is an effort to provide some experienced thoughts and reflections on that consideration.

Introduction

Raiser's Edge NXT (RE NXT in this paper) is a package of products and services that includes the next generation of The Raiser's Edge. For years now we've been using The Raiser's Edge version 7. RE NXT includes what might otherwise have been called Raiser's Edge version 8, just by another name, similar to how Microsoft named versions of Windows "Windows XP" and "Windows Vista." It's not just a cool new add-on to RE; *it includes the next generation of the product with all new technology as well as improved functionality and additional products and services from Blackbaud.*

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In addition to the new software experience, pricing for Raiser's Edge NXT has changed. Blackbaud is changing how it sells Raiser's Edge since the technical and financial worlds have changed as well.

1. Previously we paid a license fee to "buy" Raiser's Edge and then paid annual "maintenance" fees for upgrades and customer support. With RE NXT, we will pay an annual "subscription" fee. A simple example of this is how Microsoft now sells annual subscriptions to Microsoft Office—you don't have to pay around $400 to buy the new version each time they release it. You can instead pay an annual subscription fee, as I do, and always have the latest version.

2. Blackbaud, through internal growth and acquisition, offers an increasing number of products and services to the nonprofit sector. To be frank, we probably get tired of all the sales phone calls, and they probably are tired of constantly calling us. Additionally, shouldn't a fundraising product that claims to be, and aspires to be, the leading solution on the market incorporate the latest advances in fundraising and technology? Shouldn't it have built-in email and online giving capabilities, handle monthly giving natively, and incorporate analytics? Yes!

So not only are we moving from RE 7 to RE NXT, we're changing our contractual relationship with Blackbaud for the software to meet this new financial model in the technical world and to incorporate a lot more "goodness" from Blackbaud into our RE experience.

In making these somewhat radical changes (for those of us that have been around Raiser's Edge for a while), Blackbaud made another big change: It stopped charging organizations for how many concurrent user licenses they need. Instead, it's giving organizations *unlimited user licenses for RE*. We'll talk about that more below.

Blackbaud does need a fair way to charge organizations based on how much software and services they use. The answer Blackbaud came up with was to charge based on Constituent record count (full individual and organization records). The prices are based on ranges, like 40,000 to 50,000 records, which Blackbaud is calling "record bands," not a per-constituent price. If you're in the 40,000 to 50,000 band, you can have up to 50,000 constituents in your database. When you go over 50,000, your price will increase based on the price of the next record band.

I know nonprofits don't have an unending supply of money to spend on their fundraising software. My second nonprofit job was as director of development for a youth organization in Arizona. Our executive director was so cost-conscious that we were not allowed to buy binder clips (too expensive!; as a result, I still hoard them to this day) and we were told to bring back the pads and pens from meetings at hotels so the organization didn't have to buy them. So I get it, we want more money for our mission, not for fundraising software.

Some organizations have looked at this new pricing model and said, "Hmmm, I wonder if we could save money if we deleted or archived a lot of the records out of RE so our database is smaller and our annual subscription fee would be lower?" Not an unreasonable question, and one I thought about in the fall of 2014 when I first understood this pricing change myself. *But the follow-up question needs to be, "Is removing records from our RE database a good idea? Does that make sense?"* This paper is about my thoughts on that matter.

User Licenses vs. Record Count

At first I was opposed to the pricing change when it was shared with me in the fall of 2014. Frankly, I thought, "What is Blackbaud up to?" I know others have thought that as well. But as I have pondered this more over time since my first reaction, *I am a supporter of switching the pricing model from user licenses to record count.*

Why? I think it's ridiculous that in 2016 we still have fundraisers who can't and don't get into the fundraising system! We call it a "fundraising system," but the people least likely to use RE in a development shop are the fundraisers! We call it a "donor management system," but the people least likely to use the system are the donor managers! We call it a "constituent relationship management system," but the people least likely to use it are the constituent relationship managers!

I think that's due to several reasons, but here are two of them: First, the design of The Raiser's Edge 7. Sure, it could be easier for fundraisers, in their roles as fundraisers, to use. That is exactly one of the primary design objectives that RE NXT strives to meet and which has received such positive response.

Second, the reason many fundraisers are not using the system more is often because organizations don't buy enough user licenses. Not always, but often. I've sat in offices where Yammer messages or emails have to be sent around…"Can someone get out of RE, I need to get in?" And I've heard people yell the same thing across offices.

Really? In 2016 we would laugh a development "professional" out of the profession if they came in and said, "Well I don't do email, someone will need to check my email for me, print it, give it to me, I'll write notes back on it, and then they can send my email for me"! Yet that, in essence, is what we have created as acceptable behavior for fundraisers with their fundraising database.

The design of RE NXT and unlimited user licenses eliminates these two barriers so that all fundraisers can get into the database, any time (day, night, and weekends), anywhere (at work, at home, and on the road) and on any device (phone, tablet, work computer, and home computer) with a friendly, good-looking, modern interface built just for them.

Additionally, these changes and others let folks in who we might not have thought about before, such as volunteer fundraisers (e.g., class agents, board members assisting with major gifts cultivation and solicitation) and other staff, from the executive director and her support staff to

even possibly program staff and others who might have interactions with our constituents (all with proper security controls, of course).

While in some sense it might have been financially prudent for an organization to buy fewer user licenses than they needed, it was a fundraising "bad practice" that supported and continued bad behaviors and bad habits. Unlimited user licenses included with RE NXT eliminates that barrier.

But Blackbaud does need a pricing model for RE NXT that differentiates how much software and services organizations need among organization sizes, for both its benefit (yes, let's be honest) as well as organizations' benefit. I work with small organizations that have as few as one to three users and others with dozens to over 200 users of The Raiser's Edge. It's not desirable to charge everyone the same price.

So how does Blackbaud measure size? Constituent Record count is the metric Blackbaud is using for RE NXT. It's not a perfect idea, of course—what is?—but it does seem to be a fair attempt at getting at organization size and usage of the database to vary pricing fairly. I am concerned about the possible new bad behaviors that this pricing model will create, however, which I talk about below.

(Some of the people who reviewed the draft of this paper responded, "But our organization did buy enough user licenses, so I don't know that I agree with your logic above" or "It doesn't apply to us." I think that's fair and want to acknowledge that if that's your organization, and would add the following comments to those in that situation: (1) Remember, this whitepaper is about deleting constituents or not. Whether you or I like this pricing approach better or not, whether we agree with it, it is the new pricing mechanism that Blackbaud has chosen. I'm trying to add some context in this section, but even if you disagree, remember the fundamental point is whether or not you should delete records, and I hope the rationale expressed in the other sections will still ring true for you. (2) Consider yourself historically fortunate. Most organizations have not bought enough user licenses for all development and related staff to be in the database as frequently as they should, so if your organization did, it's in the minority. While you might feel like this change is a disservice to you, I think overall for most organizations it's a positive change. (3) Blackbaud still has to price based on some measure of organization size. We don't know whether RE NXT pricing for your organization would have been higher or lower had Blackbaud stayed with user-license pricing. If you have what would seem to be disproportionate number of records to users, talk with your Blackbaud account executive; Blackbaud has acknowledged this can happen and has worked with organizations through this. (4) If your organization's price is going up for NXT, remember it mostly likely has more to do with all the new things included in the RE NXT package than the number of records in your database. (5) I welcome the opportunity to expand the database use beyond the traditional users, as I discuss above, and would encourage you to think of those additional user opportunities that your current RE 7 count may not account for. (6) Finally, again, it is what it is at this point. We shouldn't "cut off our noses to spite our faces." Whether you agree with Blackbaud or not, whether you agree with me in this section or not, please consider the points made about whether it makes sense to delete records from your database or not—that is the real point of this whitepaper. Thanks.)

Is Record Count Fair?

Some things to know and think about when you hear about pricing by record count:

- Pricing is currently based on *total Constituent Record count.* This is a number current RE 7 customers can easily see: simply log into The Raiser's Edge, go to Administration (you have to have the security rights), and click on System Statistics. That's it, that's the number, no magic to it.

- *The vast majority* of fundraising databases have a high proportion of records that have no recent activity, either by the constituent, such as giving, or by the organization on them, such as mailings. My informal estimate is that most fundraising databases are actively mailing, getting gifts from, reporting on, cultivating, soliciting, etc., only 20-40% of their records. So it's unlikely your organization is unique in that. And here's an important point: *Blackbaud has consistently told me they know this and have priced the RE NXT record bands accordingly.* So for example, you might say, if we have 40,000 constituents in our database, only 10,000 of them are actively used, why should we have to pay the price for 40,000? Blackbaud's response would be, yes, we know that and expect that, and the price for 40,000 total records is similar to a pricing model for 10,000 actively used records. (Not being privy to Blackbaud's exact pricing models, I have made up these numbers, but the concept is the point.)

- So why doesn't Blackbaud only charge for the records in the database not marked Inactive (i.e., the **Inactive** checkbox has no checkmark)? Quite simply, and I agree with Blackbaud on this, that would be too easy to "game" the system. *In RE there is almost nothing you can do with active records that you can't also do with inactive records.* You can mail to them, you can enter gifts for them, you can look them up, you can export them. It's simply a checkbox for each of the output options (Query, Mail, Reports, and Export) whether they are included or not. I could easily mark 100% of the records in my database as Inactive and go about business as usual. That's not fair to Blackbaud, and more importantly, perhaps, that's not fair for those of you that would try to be fair if other organizations decided to game the system.

  (As a side note, I am not a fan of the Inactive checkbox anyway. I do *not* recommend that organizations use this field, certainly not globally marking records as inactive because they haven't given, are deceased, etc. If RE is used correctly with all the other checkboxes and fields available, the Inactive field is actually a more dangerous than useful field due to the confusion it often causes over time.)

- And it's highly unlikely that you have a high percentage of garbage records in your database. I've rarely seen organizations that just took lists and dumped them into RE—it happens, but infrequently. The vast majority of the records in your database are likely there for a reason

and their presence most likely means something and provides useful, if not frequently accessed, information.

Yes, the pricing by record count will possibly encourage organizations to start two bad habits:

1. Deleting records currently in RE
2. Not putting records into RE NXT that should be there

I have *strongly* suggested to Blackbaud ideas for better identifying actively used records and adjusting the bands to discourage these bad practices. I'm told they are taking my feedback and others' under consideration. But in the meantime, the idea of record count as a means to judge database and organization size does seem to me to have merit.

And because, as a 20+ year fundraiser and RE consultant, I so dislike the bad habits that purchasing by user licenses creates, I have decided I do prefer pricing by record count over user licenses.

So, To Delete or Not to Delete Records?

You can probably tell already where I'm going to side on this question, so let's just be direct at the outset: *I think, based on my 20 years of consulting on The Raiser's Edge, the vast majority of organizations would be making a huge mistake to either delete records from The Raiser's Edge or change established best practices we have been following under RE 7 for records that should go in Raiser's Edge.*

Why? *Because the vast majority of the records are there for a reason, and those reasons have not gone away.* While I agree money doesn't grow on trees and nonprofits need to be careful about costs, *let's not replace one bad habit for another.*

Last year I reviewed a real client's database for the opportunity to delete records for this exact purpose. Here's what I found in that database of 160,000 constituents in about 10-15 minutes, shared with their permission:

- 49,586 records with no hard credit gift activity
  - 45,099 of those had no actions
    - 44,804 of those had no linked event record
      - 44,500 of those had no volunteer assignment
        - 21,002 of those had no volunteer time sheet (which means that 23,498 of these folks did have a volunteer time sheet)
          - 20,999 had no proposal
            - 17,559 had no individual relationships
              - 6,735 had no organization relationships
                - 5,365 had no soft credit gifts (forgot to apply that in the first step above)
                - 3,437 had no notes

At that point we just stopped. If we were already down to less than 3,500 records, would a serious investment of time be justified to try to find a few records to delete for this purpose? Probably not, especially when the record bands at this size are 50,000 records.

Keep in mind that *the number of records to be deleted has to be significant to be meaningful on the price.* For example, if you're at the 40,000 record band, to get to the 30,000 record band you need to delete approximately 25% of your database! If you're over the 100,000 record band, can you really delete enough records to make any meaningful price impact?

Should you just look at the issue? Sure, there's nothing wrong with spending a few minutes understanding your database and seeing if a predecessor did dump in a lot of name-and-address-only records that could just be deleted. The appendix of this document contains illustrations of RE queries you might want to write to do the analysis I did above. *But be careful with your expectations.*

- As discussed above, depending on how your organization defines the use of the **Inactive** checkbox—and most organizations do not have a consistent, documented definition for it—you don't necessarily want to remove these records. The fact that they are inactive may mean something, perhaps. Do you want to remove that meaning from the database? For example, when an unhappy constituent calls and says, "Take me out of your database, I never want to hear from you again!," our answer, delivered diplomatically, should be, in essence, "I'm so sorry you're upset, but of course we'll honor your wishes. Rather than deleting your information from our database and not being able to record that you don't want to hear from us, I will mark your record that we should not contact you. That way we know and can respect your wishes and if your name resurfaces some other way, the database clearly indicates to me, my colleagues, and those that come after us you don't want to be contacted. If we remove your name then there's a good chance your name will resurface and you will hear from us again, but this way we can ensure you don't."

- Similarly, for records marked Do Not Contact, Do Not Mail, etc.—we need that history, we don't want it removed from the database, it's a very primary purpose of the database as much as the database is about who *to* contact.

- Gift information is stored only in Constituent records. You delete the constituent, you delete their gifts. This means any records you remove from RE with old gifts will improperly report any institutional giving history you do from RE. And as Blackbaud is planning robust reporting built into RE NXT, you are possibly removing critical history of institutional performance and detailed statistics by removing "old" donors.

- Remember that RE is much more than just a gift processing database. There are all kinds of other information that might be on records, records with no gift history at all or no recent gift history, that are valuable information as well. For example:

  o Prospects! Raiser's Edge is a fundraising database, not a "donor database," and all your prospects, current and past, should be in the database and kept there
  o Memberships, if you have that module
  o Volunteer history, if you have that module
  o Event participation history, if you have that module
  o Tribute information and linked gifts, if you have that module
  o Relationships, such as family, legal and financial advisers, and places of employment and other community involvement
  o Actions recording meaningful interactions your organization had with the constituent
  o Notes, which can contain important information whether used correctly or incorrectly (many users wrongly put constituent interactions here, which more properly go in Actions)
  o Having asked for a donation and gotten a "no" is important information to know so you don't waste efforts again later, whether that detail is stored in Appeals, Proposals or Notes

- Deceased constituents are not good candidates for deletion for a number of reasons as well:
  o Most organizations don't get a lot of deceased information, so it's unlikely there are a lot of them to begin with
  o Planned gift information and Legacy Society information stored on those records is still helpful
  o They may have open or pending estate gifts that still need to be tracked
  o They may have "in memory of" gifts set up and linked to them which will be destroyed if the deceased is removed
  o Do you really want to "find" the name again and start mailing to them when you're supposed to know they're deceased?

Some people are considering, "Well we won't just *delete* the information, we'll *export* it to Excel and keep it outside RE NXT so we can save money with Blackbaud but not lose the information."

My first response to that, to be honest, is Really!? We've just spent all these years trying to get rid of rogue databases, spreadsheets, hard copy files, even microfiche records, and other data outside RE, to get all the fundraisers and users into one system, and now you want to go and create another database? Really?!

But here are some other thoughts:

- You can't just export RE to Excel. Excel is a "flat" format while RE data is relational. A constituent can have unlimited numbers of gifts, notes, actions, relationships and so forth— there is absolutely no thorough or good way to store that in Excel.

- One might consider putting it into Microsoft Access which is a relational database. Again my response is, Really? You really have the time and expertise to get into that level of technical tools and support? Most RE database administrators do not know Microsoft Access or any other relational database tool and this will be a time-consuming process to set up and support. Is the money you would save to go down a record band so substantial to justify the work and expertise to do this correctly? Don't just think of the capabilities of the staff you have now, but think also of the high-turnover in our field and whether that skill set will always be available on your staff.

- Even if you do get the data exported into Access or something similar, then what?

    o Does that mean every time any user does a lookup in RE and they don't find a record they now have to go look in this archived copy of RE to see if the constituent is there instead?

    o Does that mean that every time your gift processor has what appears to be a new donor that they have to go look over there as well?

    o What if someone you've archived does re-engage with you? How much time and effort will it take to re-create a proper and complete RE record for them?

    o RE NXT is going to have reporting on donor retention and donor re-acquisition. You'll potentially lose the accuracy of those tools if you remove records from the database.

    o And what about security?! RE NXT has all kinds of security tools to ensure your constituents' personal and private information is protected, and now it's going to sit in an Excel spreadsheet or Microsoft Access database on the network for anyone to access? What about people copying that data, backups being stored by whomever, wherever? How excited are you to go to your executive director and say, "Well so-and-so had a copy of that data on their laptop and the laptop was lost/stolen? What should

we do now that our constituents' private data has been compromised?" When that data might have gift history, contact information, private notes, wealth data, birthdates, etc.?

This sounds like a recipe for disaster.

No, you're not likely to need or use extensively *all* of these older records we're talking about. But the trick is, you're *very likely to need some of them, but it's impossible to know which ones now.* So everyone should just stay.

Furthermore, the RE NXT package and your overall record count are bigger determinants in your total price than moving down one record band. *Don't just think of the pros and cons of the discussion above, think about it in terms of the likely small difference going one record band down will save you. Is that relatively small sum of money worth all of these pitfalls, all of this work, all of this risk, all of this long-term complication?*

Finally, think about the future. Turnover in development departments is very high, from the database administrators to development leadership. This is a decision that once made is very, very difficult and expensive to undo. It's pretty much a permanent decision. Do you want to be the one remembered by your successors for years to come as the one who "lost" all of this data? Think about the database you inherited—don't you want to leave the database in *better* shape for your successors?

What About Moving Forward?

To be clear, I would hope all of this discussion would be equally applied to the question of who should be added to RE. *Don't leave everyone in RE now but then decide you're going to hold off adding to RE NXT those you would have added before!*

RE is a fundraising database, not a "donor database," as discussed above. All of your prospects should be in RE NXT. *Especially* with the new functionality that has been built into RE NXT with fundraiser portfolio management tools. You want to be managing prospects in there, not keeping them in a spreadsheet until they give.

Remember that RE NXT automatically includes analytics that Blackbaud runs nightly on new constituents: Don't you want those new names run through the analytics to identify if you have an otherwise unknown gem of a prospect to pursue?

We didn't (or shouldn't) have just bought or traded prospect lists and added them to RE before and there is no need to do so now. But those that were natural candidates to add to your fundraising database—everyone you deal with—should continue to be added for all the same reasons as noted above. Although there are potential financial ramifications that didn't exist when I wrote my book on The Raiser's Edge in 2010, I would still stand by my recommendations on pages 24-29 regarding

"Who Should Be Recorded in The Raiser's Edge" (http://www.billconnors.com/pages/book.php). The fundraising and database best practices discussed there have not changed.

Let's not be "penny wise and pound foolish." Think about the money your organization could save if you didn't provide your staff telephones, computers or desks. You could save a lot of administrative money if you made your staff work across three shifts a day and share telephones, computers, and desks so you didn't have to provide one of each for each staff member. But we don't do things like that because we understand "it's the cost of doing business." Keeping our organizations' historic data, and keeping it safe, is as well.

Okay, Okay, So What Should We Do?

So is there anything you could or should do on Constituent Record count before moving to RE NXT? Two ideas:

1. If you really want to check your data, do so, just don't be optimistic. Use the criteria listed above and in the appendix to review your database.

2. Of course you should be regularly (monthly) running the Duplicate Constituent Report in Administration and merging duplicates. Nothing in the write-up above is an excuse for duplicates—we don't want them.

   If you have not run the report in a while (ever?) and you do so now for this purpose, the number of records found might be very high, but be careful before thinking you can get rid of all those records. The report's thorough searching capabilities finds many "false matches" (two different people that are similar but are different) and so it's unlikely you will be able to delete a majority of the records.[1]

Otherwise be happy you have such a robust history and perhaps find ways to re-engage the lapsed constituents you might be ignoring now rather than deleting them. Perhaps this is an opportunity to do acquisition from within your own resources rather than having to go out and buy names. (In fact, if you marked as Inactive lapsed donors in the past, you might want to remove those checkmarks so that the analytics screenings done on the database in RE NXT will be applied to those records.) At least know that you are preserving your organization's history and protecting the data.

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[1] If you have a large number of duplicates and the idea of merging each set of duplicates at a time is just too daunting, there are additional tools you can buy for Raiser's Edge to make this process faster and easier, listed here in the order the tools were released: (1) Blackbaud has a more advanced Duplicate Constituent Merge plug-in you can buy—talk to your Blackbaud account executive; (2) Zeidman Development offers The Mergician; and (3) Omatic Software offers MergeOmatic. However, as of the time of this writing the latter two tools were not directly supported in the Blackbaud Hosting environment, which RE NXT requires, so you might want to think about these tools as a one-time cleanup project.

Conclusion

"Okay, Bill," you might be saying to yourself, "this seems awfully convenient for Blackbaud. Don't you have a good relationship with them?"

And the answer would be "Yes" and "Yes." But it is what it is. I'm not going to recommend that organizations delete large parts of their databases out of spite to Blackbaud or just to appear neutral to Blackbaud. This is what I honestly think for all the pages of reasons noted above.

To Blackbaud's credit, its recent tools that interact with Raiser's Edge are *not* expecting everyone to be a constituent. For example, the email tool in Online Express, included now with RE NXT, allows you to email to relationships that are *not* constituents, like spouses and contacts. The new RE Connector between RE and the onSuite products (from Whipple Hill, which Blackbaud acquired in 2014 for their K-12 independent school clients) allows parent and grandparent couples to share a single constituent record, with one of the spouses as a non-constituent relationship. The design of Raiser's Edge has always been, and continues to be, that couples share one constituent record (and so count as 1 constituent, not 2) and RE NXT continues to support "non-constituent" relationships. So I haven't observed Blackbaud gaming the system, either, to artificially force up your record count.

I *am and will continue to* push Blackbaud to make this a more straight-forward proposition to clients, so Blackbaud is not entirely off the hook. I would like them to come up with fair ways to identify truly active records and only charge for those. But as noted earlier, I think in the end it's not going to save you any or much money because of the assumptions they've already made as discussed above and the further changes they would make—and, after Blackbaud tinkers with things, it might cost you more.

I hope it's also clear that this recommendation is not self-serving to me. I can't think of any benefit to me as an RE consultant if you do not delete records. If fact, if you want to analyze your records and want help deleting them, that's when you should give me a call so I can give you a proposal.

I really do think that, while we need to keep an eye on the bottom line, removing huge numbers of records from our databases is an incredibly risky proposition and is not the best course of action for most organizations.

Agree, disagree, think I've missed some important points? I certainly welcome your feedback at bill@billconnors.com. While I have had a number of people working at nonprofits review this paper in draft before its full release, and got meaningful feedback incorporated into this version, I'm open to others' feedback and making further changes accordingly. Thank you!

Appendixes follow on the next pages.

Appendix 1 – Query for Analysis

Below is a screenshot of a Constituent query looking for records with little activity that *might* be candidates to delete if you wish to check (some lines contain references to optional modules for RE).
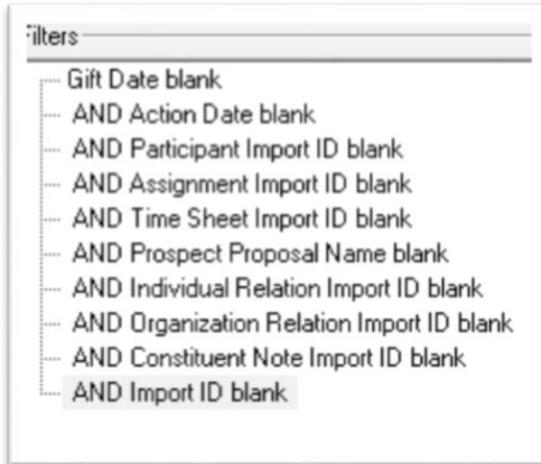
Note that the last line is the Membership Import ID if you have that module.

Also remember to set the Query Options so that you mark "Both" for Soft Credits *and* Matching Gifts.

Here's the query that a user I highly respect wrote to identify records to consider deleting in her database:
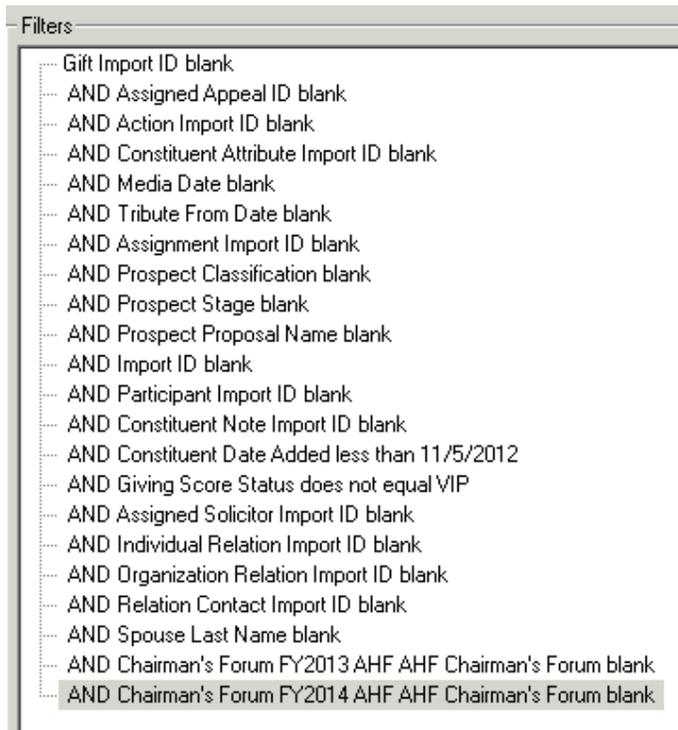
Appendix 2—What Others Have Said

Consider this blog post called out by Jeff Montgomery of Omatic Software:
https://cooldata.wordpress.com/tag/mordac/

Participating in the new Blackbaud Community? If not, you should be! Here are some good discussions on this topic that have occurred and some good comments from others. In the interest of full disclosure, not every contributor in these threads agreed with my approach above, but I'm refraining from further arguing the points made above. [Quotes changed from their original for spelling and grammar.]

https://community.blackbaud.com/forums/viewtopic/159/14557?post_id=52255#p52255

"If they have ever given do not delete. Even if it was 10 years ago."

"Our organization does not delete any records."

"We do not delete constituent records."

"I work at a college and our database is mainly alumni, so even if they are not donating we cannot delete them. Some become inactive per their request, otherwise we keep all data. The reason for this is in the past someone was deleting records and many, many years down the road we would be wondering why they were missing from our database. This usually came about during Homecoming when the reunion classes would give us a list of their class and many were missing. If they never gave before, you never know when the time comes that they change their mind. Many do after their reunion."

"We do not delete donors in our db [database]. We try to bring them back to supporting. Many who haven't supported in years or never have put us in their planned giving. So the relationship is there."

"I hate to delete records and here is one situation that would show you why. I was at a non-profit organization and when a donor passed away the non-profit was in her will for a lot of money. The children tried to fight the donation. The court stated that if we could prove the donor had given to us previously then this would (1) prove she was a donor who cared about our organization and (2) we would be entitled to the gift in the will. We were able to prove the donor had given to us in the past and we were granted the donation."

"Second, we are a RE:NXT customer currently (participated in the Early Adopters Program). I was initially concerned about the pricing based on number of records, because we have a tremendous number of duplicates that I can never seem to find the time to scrub. However, the tier we ended up in is a good 25k above where we are, so it's working for us just fine right now." [Bill: I found it interesting that in another thread regarding removing records someone said that she was considering removing records from her database but didn't have time to remove the real problems, the duplicates.]

https://community.blackbaud.com/forums/viewtopic/147/16347?post_id=52366#p52366

"We have kept all of the deceased records. Last month I had to provide a report with up to 20 years of giving histories and it was necessary to include deceased constituents in the output. In terms of shrinking the record count, I've been focused on finding duplicate individuals and organizations."

"We keep 'deceased' entries on the database so we can use it as a suppression list to double check future mailings. It's particularly useful if you're buying data for example, but also acts against embarrassing errors closer to home. Partly that's because we're a hospice and it looks really bad if we start mailing someone who chose to spend the end of their life in our care. We only have a tiny fraction of constituents marked as inactive and, as yet, I have no idea as to why."

"We have so many marked as inactive by previous employees with no explanation as to why. I've run across very active constituents marked as inactive so it's a tedious process of finding which are really inactive. I have found no real use for inactive as I initiated the practice of using the solicit code on the Bio 1 page for people who ask not to be contacted, defunct businesses, or people moved to our Alzheimer's facility."

"We keep our deceased records because of our dev[elopment] staff needing to know what the 'family' history is with us, since we're a membership-based organization, many times the surviving spouse who was the 'secondary member' will continue on supporting us, so they then become the primary member with their own membership and the deceased spouse remains on the original membership, but shows dropped with reason of deceased."

"We never delete records unless in conjunction with duplicate record clean up."