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# BBEC

## Blackbaud Enterprise Constituent Relationship Management

Breakfast Club Overview

November 2, 2011



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# BBEC Cycles

- Design: Core Principles
- Design: Marketing and Communications
- Design: Revenue Operations
- Design: Corporate & Foundation Giving & Prospect Management
- Design: Event Management & Security, Data Analysis & Admin.
- Design: Internet Design
- Test Phase



# Key Fundraising Definitions

- Revenue – what a constituent donated
- Purpose – What the money is specifically to be used for, building blocks of designations
- Designation – where the money is going; specifically for what purpose
- Campaign – why are we raising the money
- Priority – What are the monetary goals, sub-goals for the campaign



# Constituent Types

- Individual
- Organization
- Household
- Group / Committee



# Constituencies

- Each constituent can have multiple constituencies
- Default constituencies are:
  - Advocate
  - Board Member
  - Staff
  - Fundraiser
  - Major Giving prospect
  - Volunteer



# Soft Credit / Recognition Credit

- Each constituent can have multiple soft credits and recognition credits
- Recognition for a gift can be given by a relationship type or a designation
- Credit for a gift can be given by a relationship type or default designation



# Special Events

- manage all aspects of your organization's events.
- tennis tournament, an awards banquet, a trustee luncheon, a holiday party, or homecoming activities,
- record and track information such as event seating, invitation status, four-some assignment, etc
- Manage auctions



# Major Gifts (Prospects)

- define plan outlines and opportunity amount ranges for major giving prospects.
- default credit rules which assign specific percentages of credit to the manager and Solicitors associated with the plan
- track a prospect's detailed information, such as managers and status, flag and unflag prospects, and access the prospect's constituent contribution information.





# Major Gifts (Prospects)

- define a stewardship plan for a constituent
- create stewardship templates for Prospects.
  - templates include basic steps, such as meetings or phone calls, stewards perform to strengthen and retain your organization's relationship with selected donors



# Foundations (Grants)

- Create funding request outlines
- Basic steps such as meetings and phone calls needed
- Assign solicitors to the request to perform various steps
- After the grant is awarded, you can assign solicitors credit
- Create plans based on funding needs and track



# Marketing & Communications

- Manages the process for appeals, including mailings, documents & acknowledgements
- Start documents in BBEC to create source code and appeal markings
- What we consider a pledge card today, is a form of an appeal mailing in BBEC



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# Queries

- Great power to test data
- Ad-Hoc queries
- Smart queries
  - perform complex calculations that would be difficult to achieve using ad-hoc queries, and are based on templates included in the program



# Reports

- BBEC has stock reports included
- Standard BSA reports will be created in configuration
- Councils will have the ability to create their own reports



# Reports

- Appeal Reports
- Batch entry reports
- Constituent reports
- Event reports
- Fundraising reports
- List reports
- Marketing effort reports
- Major giving reports
- Membership reports
- Planner reports
- Revenue reports
- Segment reports
- Sponsorship reports
- Treasury reports
- Volunteer reports
- KPI Reports
- KPI Dashboard
- Web Dashboard



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# Timeline

- Fourth Quarter 2011 – System configuration
- First Quarter 2012 – Testing
- Second Quarter 2012 – Begin council conversions



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# Site security

- Database will hold a single individual/single organization record for the whole company
- Councils will be able to view **their** constituents records & history
- Constituent searches will span the entire database
  - Councils will be able to see that someone has a record in another council but not why





# What to do now

- Single person / organization – person/organization merge
- Clean up prospect list – delete un-needed prospects
- Clean up campaign organization – remove workers with no prospects
- Delete un-used giving categories

