**Policy for Creating New Campaigns and Funds in The Raiser’s Edge**

**February 2, 2017**

Contents

[Executive Summary 1](#_Toc34730266)

[Linking Campaigns and Funds in RE 2](#_Toc34730267)

[When to Create a New Campaign in RE 2](#_Toc34730268)

[When to Create a New Fund in RE 2](#_Toc34730269)

[How to Create a New Campaign or Fund in RE 2](#_Toc34730270)

[When to Inactivate Funds or Campaigns 3](#_Toc34730271)

[How to Inactivate Funds or Campaigns 3](#_Toc34730272)

[Changes to Procedure 3](#_Toc34730273)

[[Organization] Staff as of January, 2017 3](#_Toc34730274)

**“Campaigns** are your overall fundraising efforts or initiatives, such as operating expenses, a new building, or an endowment.”[[1]](#footnote-1)

**“Funds** — which represent the donor's intent for how you should use a gift — can help direct gifts toward specific campaigns. For example, a capital campaign for a new building may use separate funds for its furniture, structure, and landscaping.”[[2]](#footnote-2)

# Executive Summary

Only the Database Administrator for The Raiser’s Edge (RE) should be able to make changes to campaign and fund records as they are key records and small edits can cause disproportionate changes to how data is managed and reported on in RE. However, the RE Database Administrator should only make changes to campaigns and funds with direction and input from all the departments directly affected by those changes, including Finance, [Fundraising Department], and [Planning Department].

Linking Campaigns and Funds in RE

In RE each campaign may have multiple funds, while each fund can only be associated with one campaign.

# When to Create a New Campaign in RE

Campaigns in RE should represent the overall goal where income will be sought for several, distinct projects or asks. “Campaigns are your overall fundraising efforts or initiatives, such as operating expenses, a new building, or an endowment.”

A new campaign in RE should be created if:

1. a new, long-term fundraising goal is identified and several funds need to be grouped under one campaign; or
2. a new GL fund[[3]](#footnote-3) is created.

For each campaign in RE there should be three “basic” accounts:

1. general donations
2. gifts-in-kind
3. deferred

# When to Create a New Fund in RE

Create new funds in RE only if:

* a new project is needed to track transactions for this fundraising initiative;
* a new account is needed in the GL to track gifts for this fundraising initiative separately; or
* no existing fund can be used as representative of donor intent.

Fund records in RE:

* can only use one credit account at a time;
* can only be associated with one project at a time; and
* should be named to represent donor intent.

# How to Create a New Campaign or Fund in RE

1. Directors for Finance, [Fundraising Department], and [Planning Department] may request by email that the RE Database Administrator creates a new fund in RE.
2. The RE Database Administrator is responsible for:
	1. making sure the new campaign or fund:
		1. adheres to naming conventions;
		2. appears correctly on reports; and
		3. interacts effectively with all other aspects of the fundraising database: RE;
	2. for new campaigns: creating new funds for general donations, gifts-in-kind, and deferred gifts.
	3. for new funds: confirming with the Director of Finance which accounts and project (if any) are appropriate for the new fund(s); and
	4. making sure all points of this policy are met and agreed to by all involved – including the Directors and the EE Database Administrator – before creating the new campaign and/or fund and communicating their existence and purpose to Finance, [Fundraising Department], and [Planning Department].

# When to Inactivate Funds or Campaigns

Campaigns and funds cannot be deleted once they have been used, but they may be made inactive in RE (meaning the fund/campaign cannot be assigned to new gifts) if:

1. the project/grant/initiative the donations were being solicited for is finished and all outstanding pledges have either been collected or written off; or
2. there have been no new gifts to that campaign or fund in the past 18 months.

Funds and campaigns may be reactivated at any time, but the RE Database Administrator should treat them as new requests and follow this policy accordingly.

# How to Inactivate Funds or Campaigns

1. Anyone may request a fund or campaign be made inactive.
2. Since RE tracks income from [Fundraising Department] and [Planning Department], the RE Database Administrator and Directors of [Fundraising Department] and [Planning Department] must agree to inactivate the fund or campaign.
3. The RE Database Administrator is responsible for:
	1. inactivating the fund;
	2. making sure inactivating the fund does not affect reporting; and
	3. communicating the change to Finance, [Fundraising Department], and [Planning Department].

# Changes to Procedure

When there are changes to how funds and campaigns are handled, the RE DBA is responsible for making sure the changes are added to the [Organization] RE/Gift Handling guide.

# [Organization] Staff as of January, 2017

Director of Finance [NAME]

Director of [Fundraising Department] [NAME]

Director of [Planning Department] [NAME]

EE Database Administrator [NAME]

 Backup: RE Database Administrator

RE Database Administrator [NAME]

 Backup: EE Database Administrator

1. November 2016: https://www.blackbaud.com/support/howto/coveo/renxt/bb-campaign-best-practices.html [↑](#footnote-ref-1)
2. November 2016: https://www.blackbaud.com/support/howto/coveo/renxt/bb-campaign-best-practices.html [↑](#footnote-ref-2)
3. In the GL “fund” uses an accounting – not fundraising – definition. These loosely compare to campaigns in RE, although more than one campaign may be linked to the same GL fund. For example, both the Annual Donations campaign and Major Events campaign in RE are linked to the GL Operating fund. [↑](#footnote-ref-3)