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

**[DATE]**

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**“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, Development Dept #1, and Development Dept #2.

How [Your Organization] Links Campaigns and Funds in RE

[Your Organization] maintains RE so that 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.”[[3]](#footnote-3)

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[[4]](#footnote-4) 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

New funds should be created 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, Development Dept #1, and Development Dept #2 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, GiK, 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, Development Dept #1, and Development Dept #2.

# 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 Development Dept #1 and Development Dept #2, the RE Database Administrator and Directors of Development Dept #1 and Development Dept #2 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, Development Dept #1, and Development Dept #2.

# 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 [Your Organization] RE/Gift Handling guide.

# [Your Organization] Staff as of [Some Date]

Director of Finance FirstName LastName

Director of Development Dept #1 FirstName LastName

Director of Development Dept #2 FirstName LastName

EE Database Administrator FirstName LastName

 Backup: RE Database Administrator

RE Database Administrator FirstName LastName

 Backup: EE Database Administrator

1. https://www.blackbaud.com/support/howto/coveo/renxt/bb-campaign-best-practices.html [↑](#footnote-ref-1)
2. https://www.blackbaud.com/support/howto/coveo/renxt/bb-campaign-best-practices.html [↑](#footnote-ref-2)
3. November 2016: <https://www.blackbaud.com/support/howto/coveo/renxt/bb-campaign-best-practices.html> [↑](#footnote-ref-3)
4. In the GL “fund” uses an accounting – not fundraising – definition. The GL has one fund [*List your GL funds here.*] These loosely correspond to campaigns in RE, although more than one campaign may be linked to the same GL fund. (For example, both [*RE Campaign X*] and [*RE Campaign Y*] are linked to [*Name of single GL fund.*]) [↑](#footnote-ref-4)