



Implementing the Raiser's Edge Consent Module

How to Configure
Consent and use it for
Your RE Database



What does the Consent Module do?

- Uses business rules by which solicit codes are added to constituent records according to their response to communication
 - Opt-In
 - Opt-Out
 - No response



Solicit Codes and Communication

What are Solicit Codes?

How are we using them?

Do we have enough? Too many?

Is it clear in our data how constituents should or should not be contacted?

How do we communicate with our constituents?

When and how do we decide whether or not to communicate with them?

What kinds or types of information are we sending them?



Why Use Consent?

Pros:

- Consolidating communication preference information
- Consistency of data
- Building a record of response
- Accountability to GDPR Compliance

Cons:

- Preparation - cleaning up tables and configuration
- Training staff
- Consent records cannot be edited (import only)
- NXT: Communication Preferences and Consent



Preparing Your Solicit Code Table

Ask Yourself a Few Questions:

1. How do I use Solicit Codes now?
2. Are they effective? Clear purpose?
3. Are you “Opt-In” or “Opt-Out” oriented? (Positive vs Negative)
4. Clean up your table

Negative vs Positive Statements

- Do not mail
- Send magazine
- Do not contact except MFA

Define your solicit codes

At Bennington, we are using over 30 solicit codes



Understanding Consent Record Fields

1. How do you communicate with your constituents? (Channel)

a. Hard coded table

CHANNEL- Method of communication - mail, email, phone, other

2. How do you need to restrict communication? (Category)

a. Build your table around specific communication types and programs.

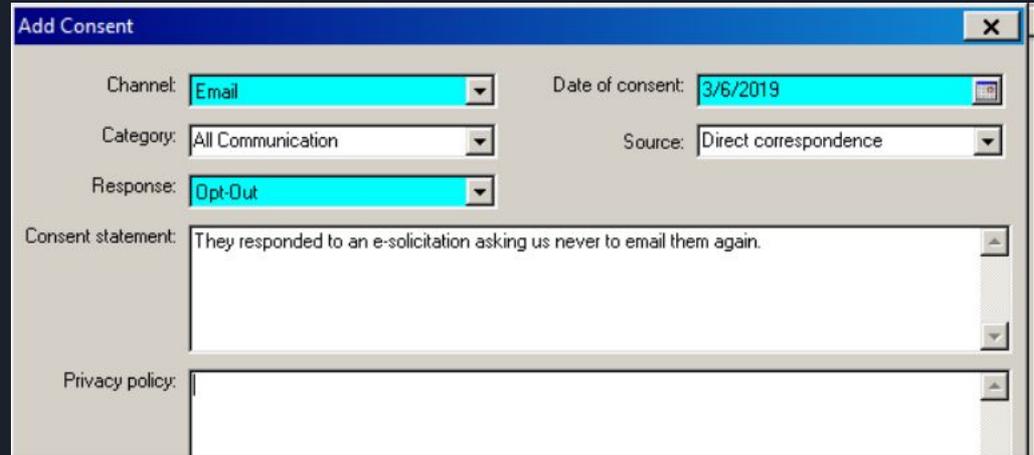
CATEGORY- What are you communicating about? Events, news, fundraising, etc.

RESPONSE - are they opting into a communication or out of it? Are they unresponsive?

CHANNEL + CATEGORY + RESPONSE =
SOLICIT CODE

Understanding Consent Record Fields

- Consent Fields:
 - Channel
 - Category
 - Date
 - Source
 - Response
 - Consent Statement (notes)
 - Privacy Policy

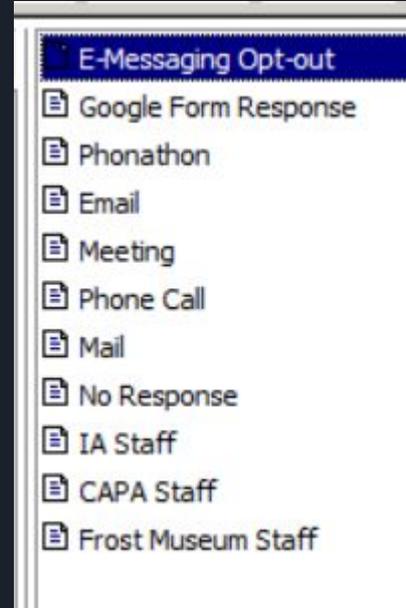


The screenshot shows a software window titled "Add Consent". It contains several input fields:

- Channel:** A dropdown menu with "Email" selected.
- Date of consent:** A date picker showing "3/6/2019".
- Category:** A dropdown menu with "All Communication" selected.
- Source:** A dropdown menu with "Direct correspondence" selected.
- Response:** A dropdown menu with "Opt-Out" selected.
- Consent statement:** A text area containing the text "They responded to an e-solicitation asking us never to email them again."
- Privacy policy:** An empty text area.

Understanding Consent Record Fields

- Consent Fields:
 - Channel
 - Category
 - Date
 - Source
 - Response
 - Consent Statement (notes)
 - Privacy Policy



Configuration

- Raiser's Edge Configuration
 - Business Rules
 - Constituent Options
 - Consent Options

New Mapping		Open	Delete
When creating new consents, check for the following business rules.			
Channel	Category		
Email	Solicitation		
Other	Solicitation		
Mail	Solicitation		
Email	Events		
Other	Events		
Mail	Events		

Configuration - Solicit Code Mapping

Edit Solicit Code Mapping [X]

Channel: Category:

Response: Opt-out

Assign Solicit Code(s): Remove Solicit Code(s):

Response: Opt-in

Assign Solicit Code(s): Remove Solicit Code(s):

Response: No response

Assign Solicit Code(s): Remove Solicit Code(s):

Configuration - Solicit Code Mapping

Edit Solicit Code Mapping [X]

Channel: Category:

Response: Opt-out

Assign Solicit Code(s):

Remove Solicit Code(s):

Response: Opt-in

Assign Solicit Code(s):

Remove Solicit Code(s):

Response: No response

Assign Solicit Code(s):

Remove Solicit Code(s):

OK Cancel

Configuration - Solicit Code Mapping (special programs)

Edit Solicit Code Mapping [X]

Channel: Category:

Response: Opt-out

Assign Solicit Code(s): Remove Solicit Code(s):

Response: Opt-in

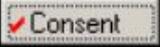
Assign Solicit Code(s): Remove Solicit Code(s):

Response: No response

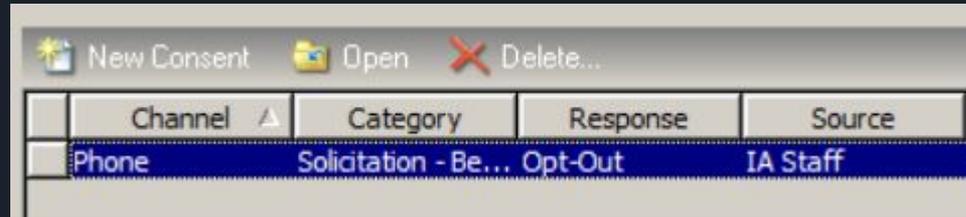
Assign Solicit Code(s): Remove Solicit Code(s):

Viewing Records - Raiser's Edge Database

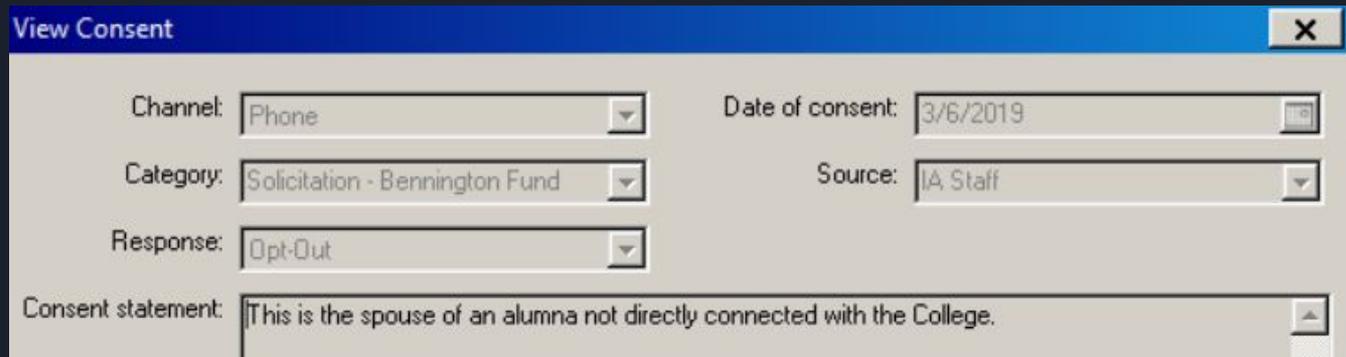
- Bottom of Bio 1 Tab

Solicit code:	Do Not Phone	
Individual (12/2/2013 -)		

Viewing Records - Raiser's Edge Database



Channel	Category	Response	Source
Phone	Solicitation - Be...	Opt-Out	IA Staff



View Consent

Channel:

Date of consent:

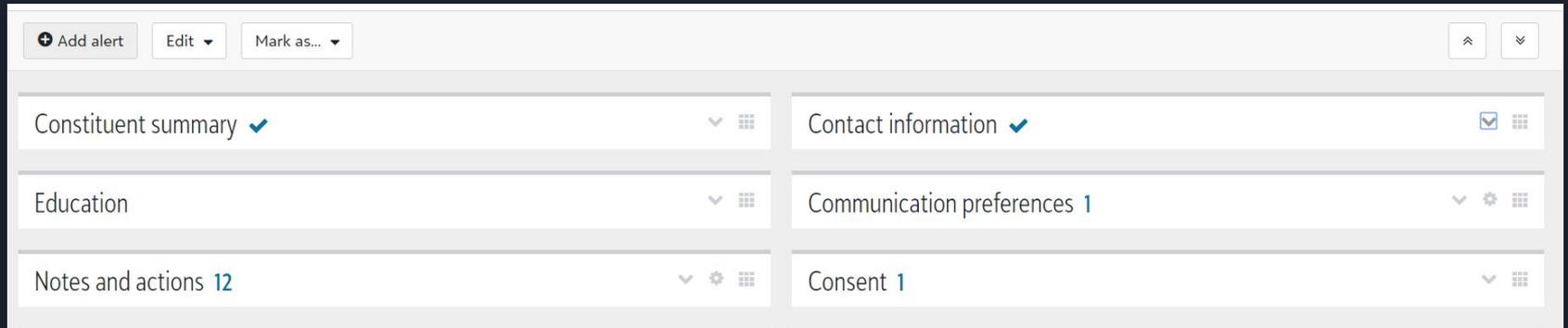
Category:

Source:

Response:

Consent statement:

Viewing Records - NXT



The screenshot displays a user interface for viewing records. At the top, there are three buttons: "Add alert" with a plus icon, "Edit" with a dropdown arrow, and "Mark as..." with a dropdown arrow. On the right side of the top bar, there are two small square icons, one with an upward arrow and one with a downward arrow. Below this is a grid of six record categories, each with a dropdown arrow and a grid icon:

- Constituent summary ✓
- Education
- Notes and actions 12
- Contact information ✓
- Communication preferences 1
- Consent 1

- Communication Preferences = Solicit Codes
- Consent = consent records/notes
- Group these together

Viewing Records - NXT

Communication preferences

[Edit](#)

Do Not Phone

Consent

[+ Add consent](#) Any channel Any category

⋮ Phone - Solicitation - Bennington Fund	Opt-out 3/6/2019 ▾
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Considerations After Implementation

1. How might changing my solicit codes (adding and deleting) affect other areas of my database?
 - a. Queries and exports
2. Have I documented a clear procedure that can be used to make edits in the future?
3. Will there be clean up of historical data or not?

Training and Internal Communications

- What has changed?
- Where to look?
- How will the information display in different systems?
- Speak the same language

Bennington Advancement Services - Data Management Articles



Questions?

Thank you!

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