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
2. How do you need to restrict communication? (Category)
    a. Build your table around specific communication types and programs.

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

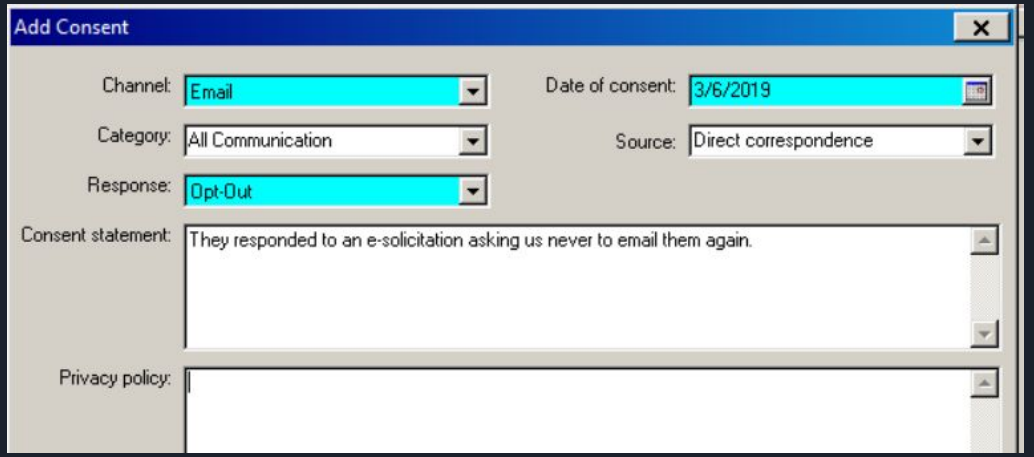
CATEGORY- What are you communicating about? Events, news, fundraising, etc.

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



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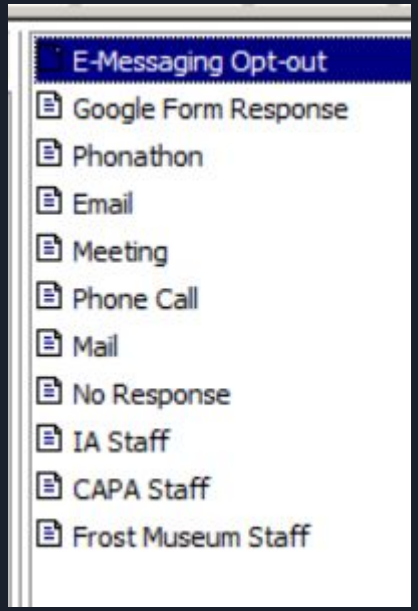
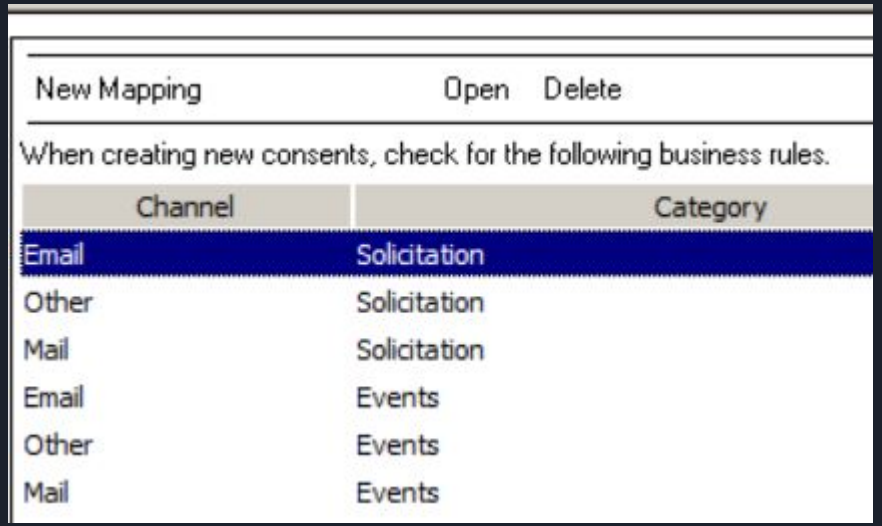
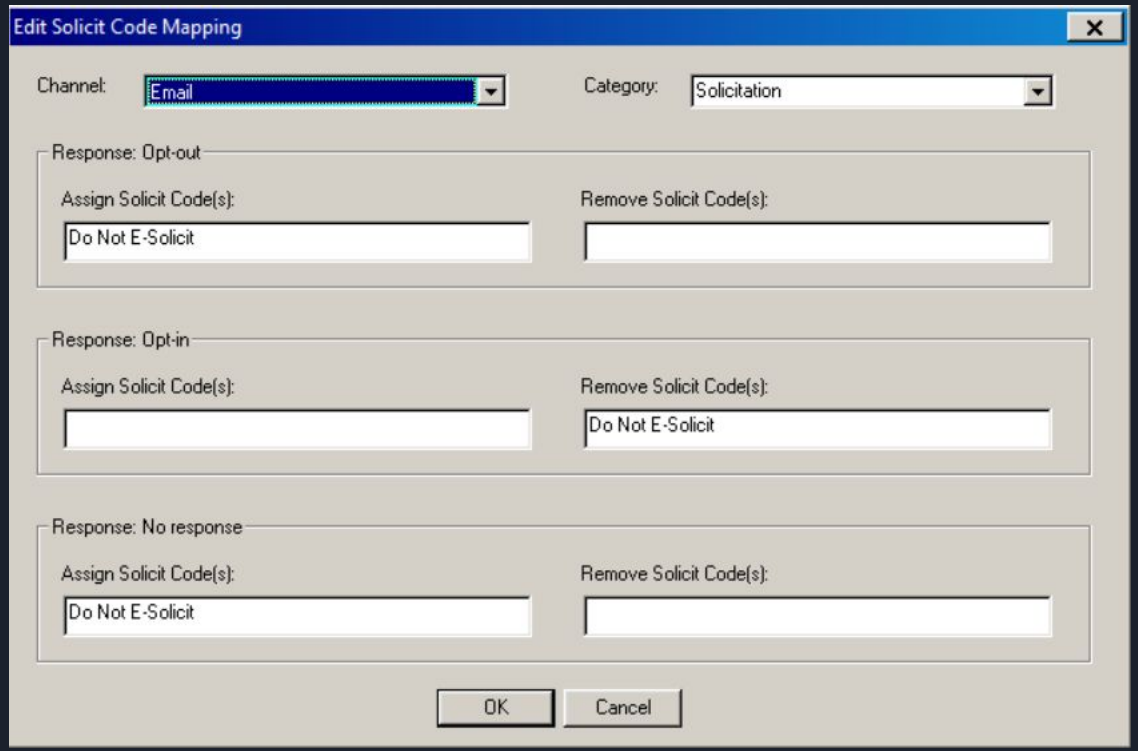


Configuration

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



Configuration - Solicit Code Mapping



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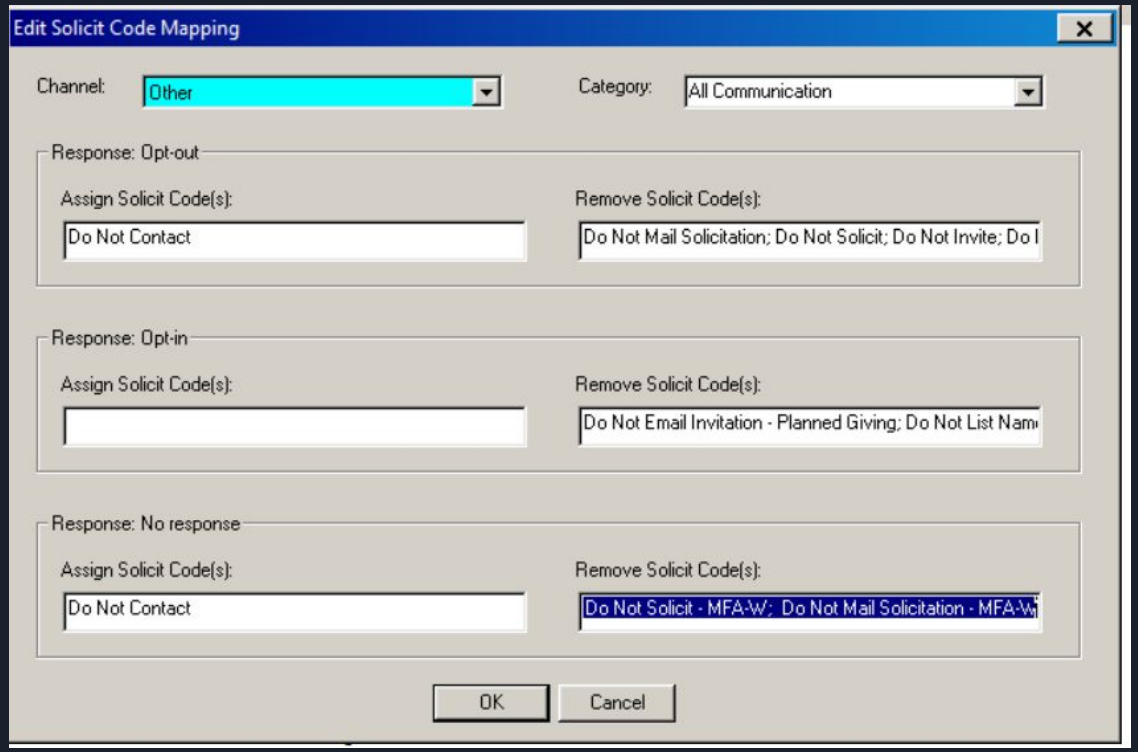
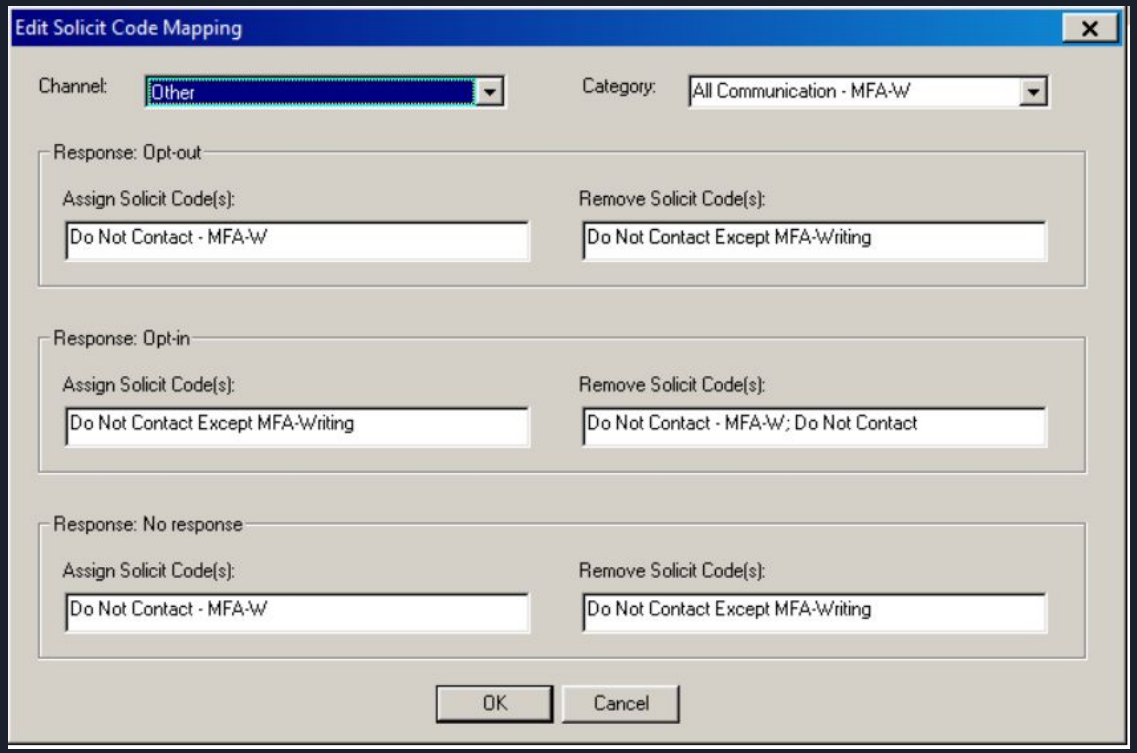


Configuration - Solicit Code Mapping (special programs)



Viewing Records - Raiser's Edge Database

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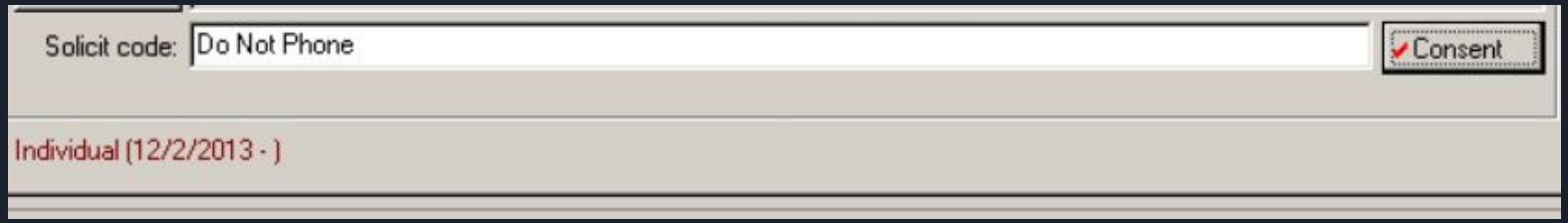

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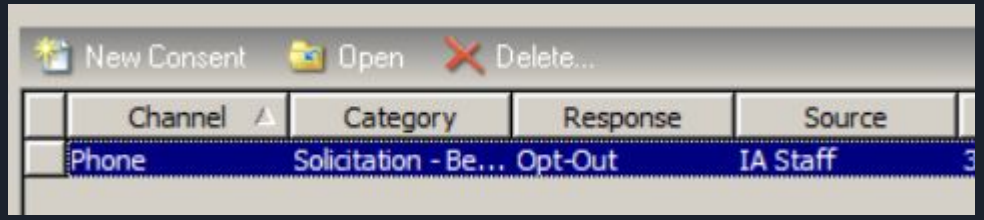
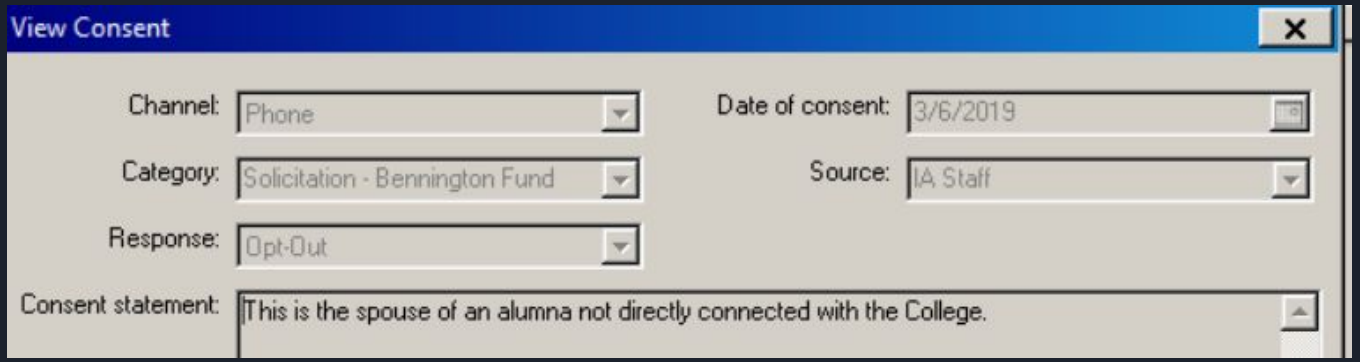
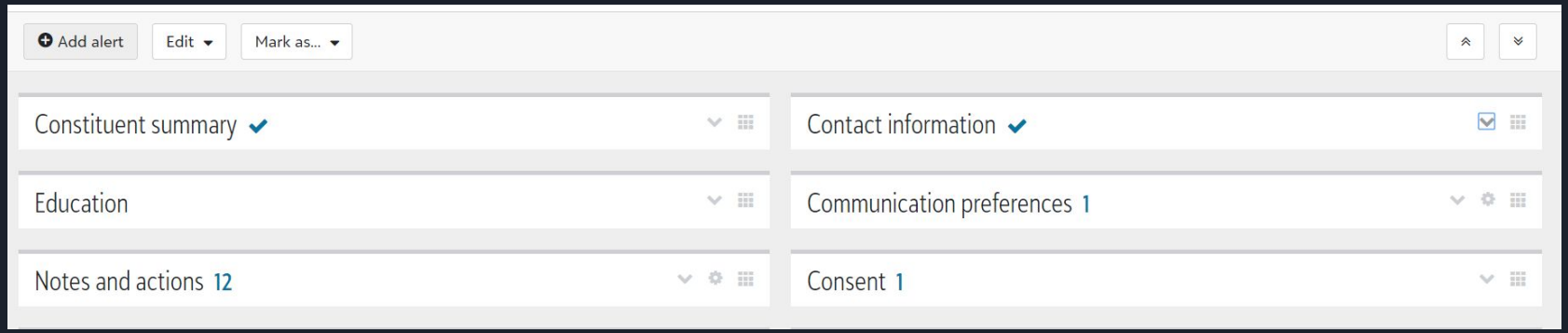


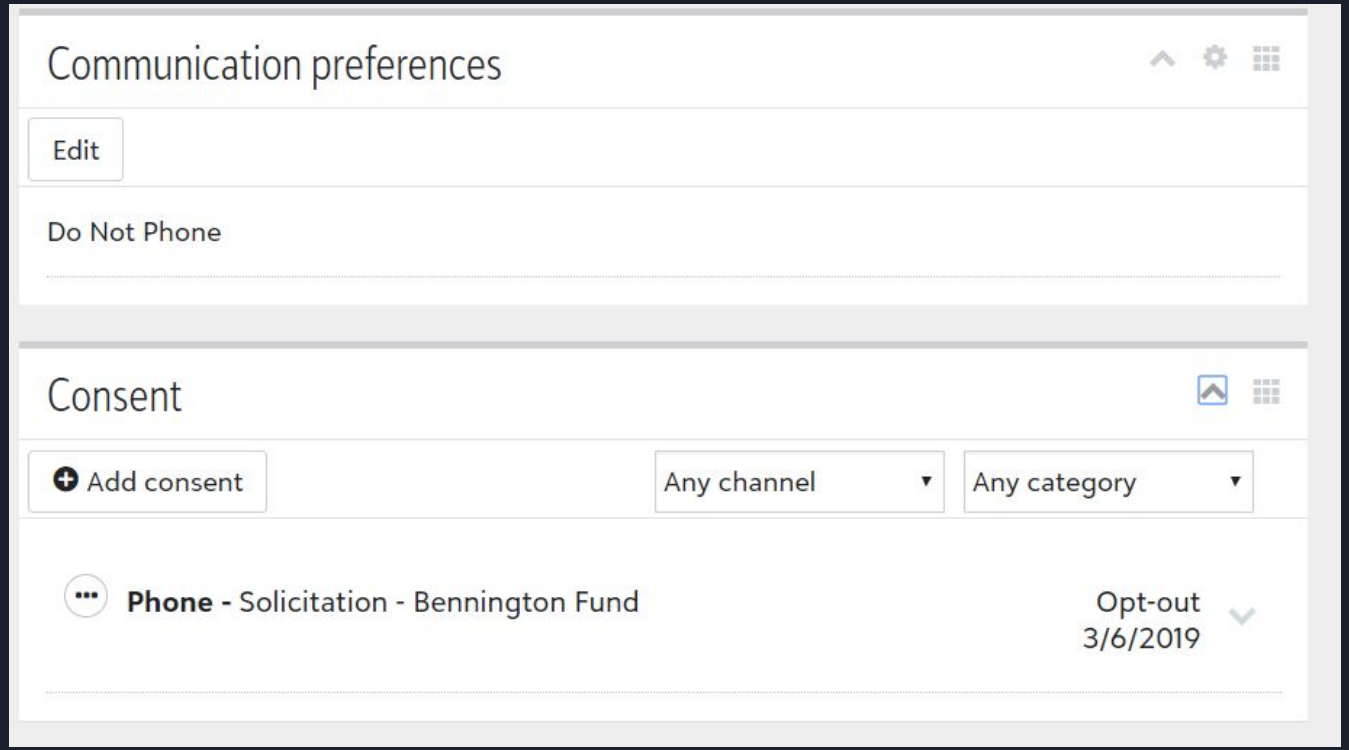


Viewing Records - NXT



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

Viewing Records - NXT



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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