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**DEVELOPERS’
CONFERENCE**
June 15–17, 2021

Managing Volunteer Fundraisers Using a Blackbaud CRM™ Portal

BLACKBAUD CRM™ TRACK

ALLEN ROTH, KAVYA SURAM

Session Host: Trevor Kelly



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Jewish Federation
OF CLEVELAND

ALLEN ROTH

DIRECTOR, BUSINESS APPLICATIONS

AT JFC: 11 YEARS

FROM: CLEVELAND, OHIO

HOBBIES: MARTIAL ARTS, STUNT ACTOR, & SAILING

KAVYA SURAM

SENIOR SOLUTIONS DEVELOPER

AT JFC: 5 YEARS

FROM : CLEVELAND, OHIO VIA INDIA

HOBBIES: GARDENING, LISTENING TO MUSIC, & COOKING



Super Sunday – In the past...

- Largest community involvement with our Annual Campaign
- A tradition for well over 50 years
- Over 1,000 volunteers, many families with children, in our building
- Most will only volunteer this single day
- Over 10 hours of calling random donors (we provide the phones)
- Volunteer solicitors with assignments start soliciting in earnest
- Over \$1,000,000 raised in a single day
- Traditionally 10's of thousands of pledge cards with potential donor information printed

Times have changed...





Trends...

- Caller ID: Donors ignoring unknown numbers
- People are communicating via other methods
- Volunteers have their own cell phones
- Making more calls to get less gifts
- COVID-19: Cannot be in-person!





Reimagining a very traditional day

We knew we had to update this very traditional day. The Pandemic forced us to act.

- More targeted outreach
- Make it personal and familiar if possible
- Utilize other avenues for outreach
 - Text
 - Email
 - Social Media
 - And Call
- Save the trees
 - Eliminate pledge cards
 - Eliminate paper reports
- Keep it simple

Do this via a responsive online “Volunteer Portal”



 Jewish Federation
OF CLEVELAND
HERE FOR GOOD
2021 CAMPAIGN


[Get Resources ?](#)

**Thank you for volunteering today.
Because of you, we are - and will be - HERE FOR GOOD**

Please verify the email address you used to register.

[Get Started](#)

If you need help from a Federation staff member for any reason, [click here](#).

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Volunteer Portal Requirements

- Meet our goals!
- Secure
 - Entry must be easy
 - Must be easy to setup with little to no effort on the volunteer's part
- If a volunteer has not already made a gift, ask them for one
- Control who the prospective donors are
- Don't annoy the prospects
- Record responses from prospects



Requirements (cont.)

- Allow volunteers to record responses from an earlier solicitation
 - Donor responded to an email, text, or social media outreach
- Allow solicitors with assignments to solicit those assignments and record gifts
- Record responses and gifts directly into CRM
- Allow the volunteer to use the device of their choice
- Make help available, but it **MUST** be simple to use!
- Make it a “friendly” experience, not a technical one!



And...

Design & Build it in
6-8 weeks!



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“Happy path” flow





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Demo

Previous responses page

The screenshot shows a web interface for managing outreach responses. At the top left is the logo for the Jewish Federation of Cleveland, 'HERE FOR GOOD 2022 CAMPAIGN'. At the top right is a 'Get Resources ?' button. The main heading reads 'Select a prospect from a previous outreach to update a response.' Below this, instructions state: 'To submit a response for a prospect that is not on this list, please call: (216) 593-2909 or email: campaign@jfcleve.org'.

On the left, a search box is labeled 'Up to the last 100 displayed' and contains the text 'Search'. Below it is a 'Prospects' list with a minus sign, containing: Hankie R. Cheef, Barbie Story, Chrisy P. Creem, and Chris P. Bacon.

The main content area displays a prospect card for 'Ms. Chrisy P. Creem - 666 Doughnut Road Dessertland, OH 99999'. The card is divided into four columns: 'ASK' (showing '\$20.00'), 'RECENT GIVING' (showing '2020 Gift: \$10.00' and '2018 Gift: \$75.00'), 'CONTACT INFO' (showing 'Business: (999) 999-9999 preferred' and 'creeme@hotmail.com'), and 'NOTES' (showing 'Silver Circle: 25 Consecutive years of giving').

Below the prospect card is a blue button that says 'Tell us how it went'. At the bottom of the page, there are two links: 'I volunteer to solicit others' (with a gear icon) and 'I'm done for now.' (with a cursor icon). A footer note reads: 'If you need help from a Federation staff member for any reason, [click here.](#)'

Assignment's page



Get Resources ?

Select a prospect to view their contact info. Prospect will remain Open until the pledge is approved by Federation.

* indicates a solicitation response was submitted

Search

Open -

- April May
- Big Apple
- Chuckles Cheese
- Honey Bee*
- Mickey Mouse

Ms. Chuckles Cheese - 2323 cleveland Kids World, OH 14313

ASK

\$20.00

Spouse: Blue Cheese

RECENT GIVING

2020 Gift: \$10.00


CONTACT INFO


Cell: (550) 005-5050 *preferred*

ccheese@icloud.com

NOTES

Tell us how it went

 [I volunteer to solicit others](#)

 [I'm done for now](#)

If you need help from a Federation staff member for any reason, [click here](#).

Architecture

CRM

- Selections
- Marketing segments
- Interactions
- Pledge Approval Workflow & Constituent Update Workflow (custom – see BBDevCon 2016 presentation)
- Design mode: Custom page, tabs, and data lists (will convert to standard SDK specs)

BBIS

- Custom framework parts (5)
- Formatted text parts
- Unformatted text parts
- And the usual
 - Layouts
 - Templates
 - Images
 - CSS

Benefits

- Fully integrated solution
- Can take advantage of our other customizations
- Already familiar with most technologies involved
- Rapid in-house development
- Responsive design capable
- Each part can be used in different ways based on configuration
- Multiple portal capability





New database tables

- Solicitation preference
 - The volunteer solicitor's solicitation preferences
- Pledge card status
 - Keep track of the card status insuring it will not be shown to two solicitors at the same time
- Solicitation response
 - Record the response to the solicitation
- Campaign participation selections
 - Which pledge cards (prospect selections) should be included in the random pledge card picker



Custom parts

1. Email Login & Authentication Part
2. Volunteer preference part
3. Prospect listing part
4. Random pledge card generator part
5. Pledge response part



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Let's look

Email Login & Authentication part

Email Authentication Form : 10-2020 Fundraise Login (Edit Part)

Design Properties Usage Targeting & security Tags

Compare Primary Email Addressess only:

Compare Email to URL Constituent ID:

Redirect URL on success:

Redirect to Pledge Card:

Maximum Ask Amount:

Redirect URL to Pledge card on success:

Campaign:

Update Campaign:

Error Messages

Email Not Found:

Email Address Required:

Multiple Constituent Account Matched:

If Compare Email to URL Constituent ID is checked

Invalid Constituent ID in URL:

Invalid Constituent Account Matched:

Configure portal timings:

Day	Start time	Close time
Sunday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>
Monday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>
Tuesday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>
Wednesday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>
Thursday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>
Friday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>
Saturday	<input type="text" value="12:00 AM"/>	<input type="text" value="12:00 AM"/>

Redirect URL when portal is inactive:

Email address

Get Started

Volunteer preference part



Welcome Allen,
tell us how you would like to help today.

TODAY I PLAN TO

Call
 Text
 Email

I WOULD PREFER TO CONTACT

I am willing to contact anyone
 I'm a Campaigner, I prefer to call my assignments
 Update response from a previous outreach
 People in this group:

All

Next

If there are currently no cards that match your criteria; please consider helping us call other community members. Every dollar counts!

Solicitation Preferences Form : 10-2020 Fundraise Preferences (Edit Part)

Design Properties Usage Targeting & security Tags

Page for call my assignments

Record previous solicitation reponses

Default page for random solicitation

Marketing segment group to display

Prospect listing part

* indicates an evaluation was submitted

Search

Open -

Olive A. Garden

Patty Teacher

Closed -

Cherry Blossom*

Matt Phalange

Regina Phalange

Skye Blue

Mr. and Mrs. Garden - 3333 Garden Drive Pepper City, OH 44444

ASK \$632.50

Spouse: Rose Garden

RECENT GIVING

2020 Gift: \$575.00

2018 Gift: \$575.00

CONTACT INFO

Cell: (216) 216-2160 *preferred*

fakeemail@email.com

NOTES


Silver Circle: 25 Conso
of giving

[Review & Evaluate](#)

[Review my other closed prospects](#)

[I'm done for now.](#)

Solicitation Assignments : 10-2020 Response Update Menu (Edit Part)

 This part is in use by multiple pages or sites. Edit this part to update all pages and sites.

Design Properties Usage Targeting & security Tags

Show:

- Assignments
- No Responses
- Rankings for Assignments
- Rankings for Closed

No Responses Settings

Number of donors to show:

Error Messages

No Solicitor constituent ID in URL:

No Campaign Structure ID in URL:

No Campaign ID selected:

Random pledge card generator part

Thank you for volunteering today!

Thanks to an anonymous donor, there is an additional \$50,000 to match new or increased gifts through the end of Campaign. Great opportunity for us to raise at least an additional \$100,000!

Here's a person you can contact for us - review the contact info below and make your outreach.

Ms. Deborah S. Friedman - 28699 Belcourt Rd Cleveland, OH 44124-5647

ASK	RECENT GIVING	CONTACT INFO	NOTES
\$100.00 Spouse: Steven G. Friedman	2019 Gift: \$100.00	Business: (216) 831-0700 x1331 Home: (216) 765-1776 outlined teacherdebbs54@yahoo.com	

Attempted to contact this prospect

[Show me a different prospect](#) [Add response for previous solicitation](#) [Change my preference](#) [I'm done for now](#)

If you need help from a Federation staff member for any reason, [click here](#).

Blackbaud Internet Solutions - Campaign for Jewish Needs - Google Chrome

https://jcf-bbtest2.jcf.local/bbis40dev/edit/10007/id/591?tabkey=TabEditor&vid=0&hbcmd=False&hbcmdweb=False&md=1

Pledge Card Form : 10-2020 Fundraise Pledge Card Form (Edit Part)

Design Properties Usage Targeting & security Tags

Implement pledge card picker:

Campaign participation selection: PC PORTAL 1 - Overall Domain (Ad-hoc Query)

Message to show if no cards are found: No more cards available. Please consider changing your preferences.

Number of minutes to wait until the pledge card pull expires: 60 minutes

Label for pledge card response button: Attempted to contact this prospect

Show interaction message:

Response part

Enter the result of your outreach

1 2 3

I RECEIVED A PLEDGE FROM

Mr. and Mrs. Marsh Mellow

Address: 1234 Desert Drive Cleveland, OH 12345
Cell:(123) 456-7890*

PLEDGE*

\$

SPECIAL INSTRUCTIONS/UPDATES

No credit card information should be placed here

Solicitation Response Form : 10-2020 Response Update Response (Edit Part)

i This part is in use by multiple pages or sites. Edit this part to update all pages and sites.

Design Properties Usage Targeting & security Tags

Only used to submit pledges:

Call back default: hours

Designation: Annual Campaign for Jewish Needs
Update Designation:

Appeal: 2021 Super Sunday
Update Appeal:

Inbound Channel

Email:

Text:

Call:

Social Media:

Interaction Contact Method

Email:

Text:

Call:

Social media:

Interaction summary text:

Toast message for job done:

Submit pledge approval request as approved:

No response wait period: hours

Track decreases:



Let's get technical...





BBIS custom part types

- Custom content parts
- Custom framework parts
 - These are what we created
- Links for more info
 - <https://developer.blackbaud.com/bbis/guide/>
 - <https://developer.blackbaud.com/bbis/guide/custom-content-parts/>
 - <https://developer.blackbaud.com/bbis/guide/custom-framework-parts/>



Custom framework part solution structure

- Catalog project – SDK infinity
- UI model project – SDK infinity
- Metal web Project – class library project – strongly typed classes generated by the Infinity Metal web code generator tool for the required Specs created and loaded to the CRM environment.
- Web project – contains the BBIS custom framework parts.



Infinity metal web generator

- SDK Infinity code generator tool which generates strongly typed classes for the SDK specs which consist of the data to be used in BBIS.
- Add all the required specs to a specific security role.
- Configure the BBMetalWeb in Visual Studio – External tools
- Run the BBMetal Web tool to generate .NET classes to represent the CRM features.



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Demo

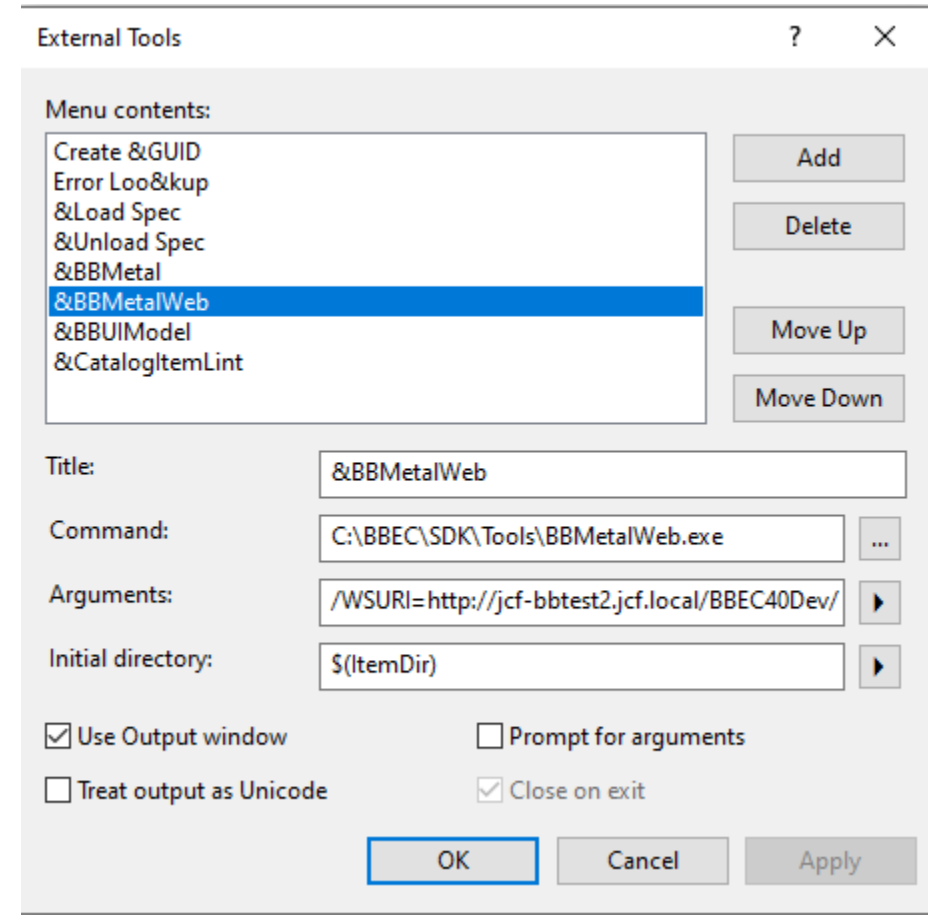


How to deploy

- Catalog and UI model assemblies
 - Vroot\bin\custom
 - Normal SDK deployment location
- Metal web and Web assemblies
 - NetCommunity\bin
- Ascx pages
 - NetCommunity\custom
- BBIS configuration
 - Administration – Custom parts – New Framework part

Metal web tool setup in VS

- Title : &BBMetalWeb
- Command:
C:\BBEC\SDK\Tools\BBMetalWeb.exe
- Arguments:
/WSURI=http://<path>/Appfxwebservice.
asmx /DB=<database name>
/targetpath=<Metal web project
path>\Codegen
/INPUTROLENAME=<CRM security role
name>





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Code snippets

Out of the box CRM component

```
recordId = Request.QueryString("CID").ToString
campaignID = Request.QueryString("CMPID").ToString

'Getting the constituent nick name or first name

Dim cname As Blackbaud.AppFx.Constituent.Catalog.WebApiClient.ViewForms.Constituent.IndividualBiographicalViewFormData

cname = Blackbaud.AppFx.Constituent.Catalog.WebApiClient.ViewForms.Constituent.IndividualBiographicalViewForm.LoadData(Me.API.AppFxWebServiceProvider, recordId)

If cname.NICKNAME.Length > 0 Then
    welcomeId.Text = cname.NICKNAME
Else
    welcomeId.Text = cname.FIRSTNAME
End If
```

Tool generated BBMetal Web classes

```
'Call the solicitor preference add form class to save the solicitor preferences to CRM database
Dim prefReq As New JF.BBIS.CustomFx.Campaign.MetalWeb.AddForms.VolunteerPortalCustom.AddSolicitationPreferencesAddDataFormData

prefReq.CONSTITUENTID = Guid.Parse(recordId)
If callpf.Checked Then
    prefReq.PREFERCALL = True
Else
    prefReq.PREFERCALL = False
End If

If textpf.Checked Then
    prefReq.PREFERTEXT = True
Else
    prefReq.PREFERTEXT = False
End If

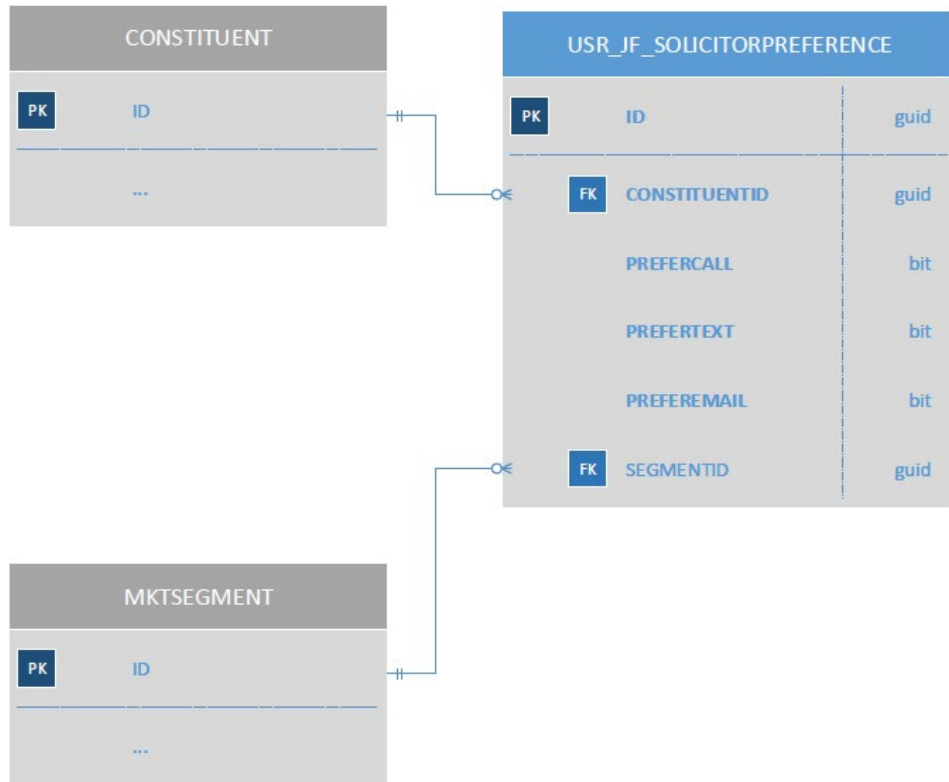
If emailpf.Checked Then
    prefReq.PREFEREMAIL = True
Else
    prefReq.PREFEREMAIL = False
End If

If groups.SelectedValue <> "" Then
    Dim segID As String = groups.SelectedValue
    prefReq.MKTSEGMENTID = Guid.Parse(segID)
End If

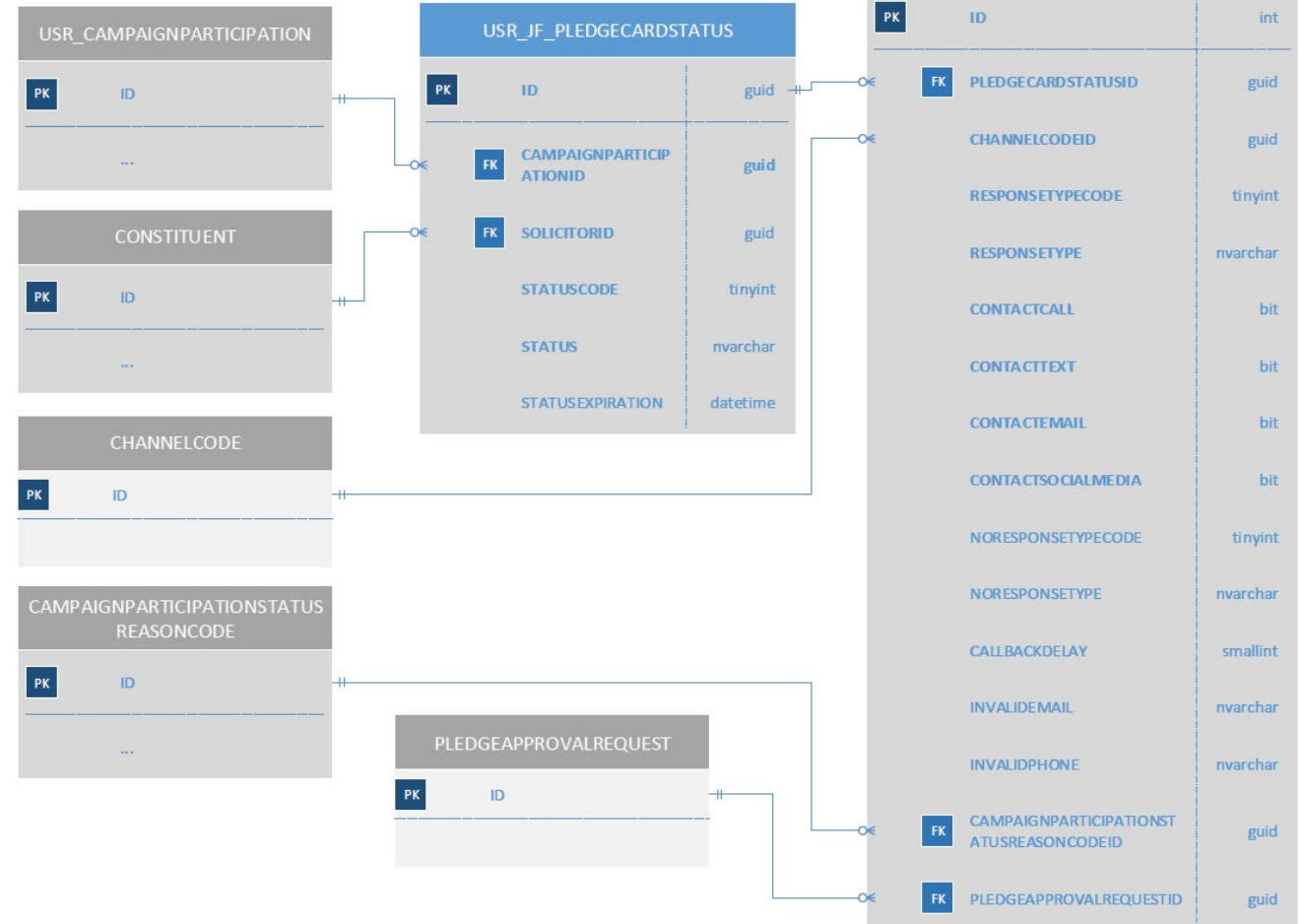
prefReq.Save(Me.API.AppFxWebServiceProvider)
```

New database tables (in blue)

Solicitor Tables



Pledge Card Tables



USR_JF_SOLICITATIONRESPONSE		
PK	ID	int
FK	PLEDGECARDSTATUSID	guid
	CHANNELCODEID	guid
	RESPONSETYPECODE	tinyint
	RESPONSETYPE	nvarchar
	CONTACTCALL	bit
	CONTACTTEXT	bit
	CONTACTEMAIL	bit
	CONTACTSOCIALMEDIA	bit
	NORESPONSETYPECODE	tinyint
	NORESPONSETYPE	nvarchar
	CALLBACKDELAY	smallint
	INVALIDEMAIL	nvarchar
	INVALIDPHONE	nvarchar
FK	CAMPAIGNPARTICIPATIONSTATUSREASONCODEID	guid
FK	PLEDGEAPPROVALREQUESTID	guid

*New campaign participation selections table not shown



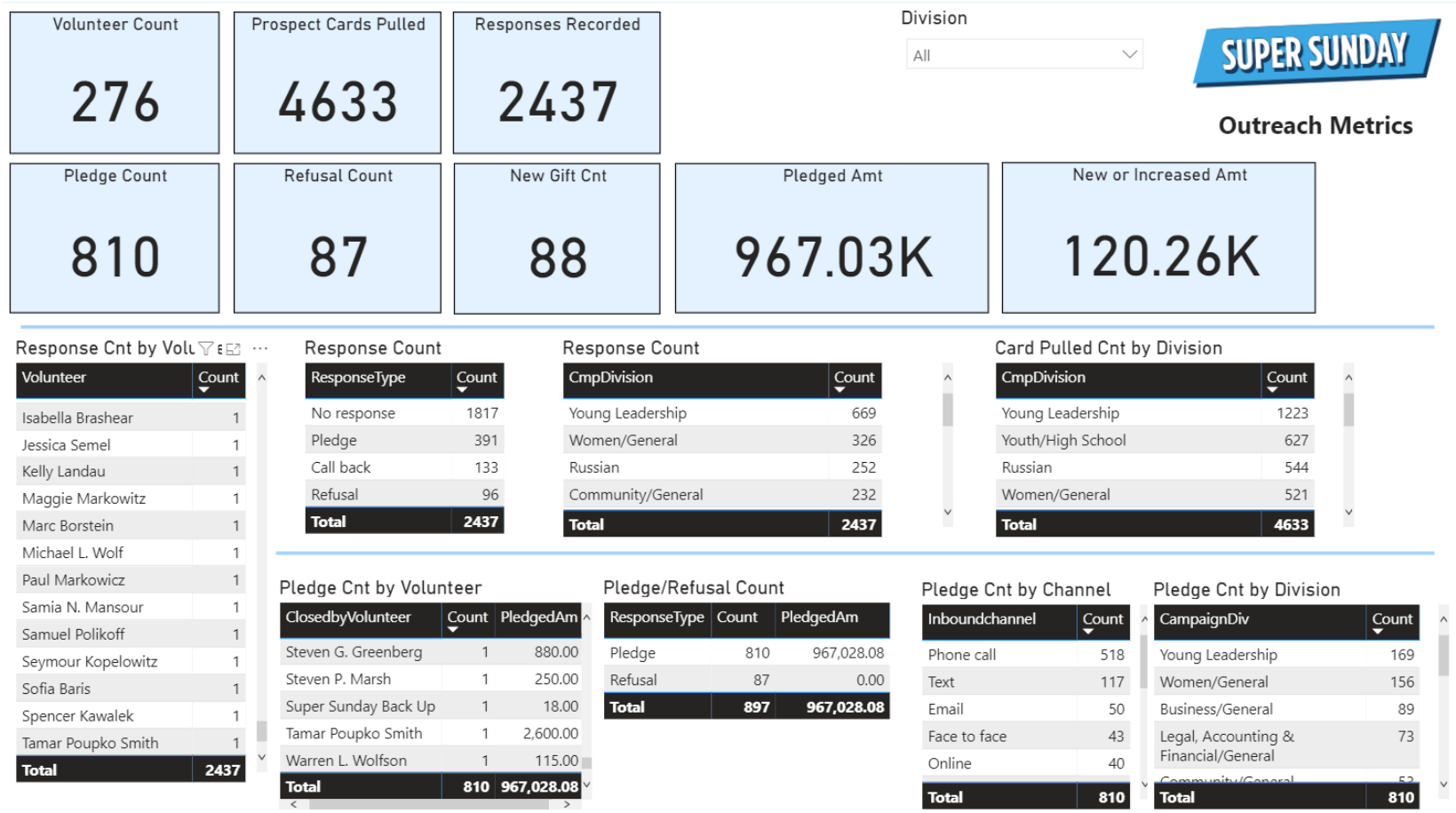
SDK components within CRM

- New constituent record Volunteer Portal tab
 - Display constituent specific information related to the portal
 - Includes a custom link to each portal instance
- Query views
- New “Online pledge cards” page
 - Display overall portal information for admins
- Selection configuration
 - Which pledge cards (prospect selections) should be included in the random pledge card picker

Technology

- Custom parts were built on the Microsoft ASP.Net platform .
- Code is written in Vb.net.
- Database – Microsoft SQL server 2014 CRM database
- Client-side scripting – JavaScript, jQuery, ajax.
- Web page design – HTML, CSS for styling.
- CRM SDK specs
- Dashboard – PowerBI and OData

Super Sunday Analytics – BONUS!



Massive Success!!

- Over 250 volunteers accessed the portal (only 25% of our usual attendance)
- Over 4,500 prospects cards were viewed
- Over 2,400 responses were recorded
- Text was our #2 pledged response channel!
- Our top volunteers entered over 80 responses!!



CLEVELAND Jewish News

Federation's Super Sunday raises \$979,315

JANE KAUFMAN | STAFF REPORTER
jkaufman@cjn.org

Posted Oct 18, 2020 at 5: 17 PM Updated Oct 22, 2020 at 9: 04 AM



Rachel Lappen accepts tzedakah from Shoshana Grundfast, 2 1/2, of Beachwood, on behalf of the Jewish Federation of Cleveland at Super Sunday Oct. 18. Eighty-eight children dropped off tzedakah at two locations totaling \$1,080. | CJN Photo / Jane Kaufman

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Rachel Lappen
Jewish Federation
of Cleveland
Chief Development
Officer:

The portal “...is truly a game changer when it comes to community outreach and solicitation. What they developed in our new donor portal was nothing short of genius, especially in the time frame in which they were able to do this. I really do believe that they have now revolutionized how to utilize volunteers for donor solicitation.”



Portal 2.0

- Improve and enhance current parts
- Create a portal “Welcome” home page after authentication
 - Display general campaign and solicitor metrics
 - Display volunteer’s outreach history
 - Links to other campaign sites and training materials
 - Preferences part
- Add additional insight to live portal activity metrics in CRM
- Display on the constituent record in CRM
 - When their pledge card appeared in the portal, outreach efforts and results
 - Their portal usage and efforts as a volunteer solicitor



Additional parts on the roadmap

- Prospect ranking response part (V 1.1)
- Solicitor outreach history part
- Solicitor email generator part
 - Allow the solicitor to generate a thank you email to the prospect with a personal note
 - When the prospect asks to "Email me my card", generate an email to them with a case for giving that includes a hyperlink to make a gift
- Prospect search part
 - Allows the user to locate a specific prospect that is configured as available
 - Can redirect to a page to solicit, rank, send a thank you, etc.



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QUESTIONS?

Let's Connect



[@aroeth1330](https://twitter.com/aroeth1330)

[@kavyareddy11](https://twitter.com/kavyareddy11)



[@allen.roth.690](https://www.instagram.com/allen.roth.690)

[@kavyasuram](https://www.instagram.com/kavyasuram)



[allen.roth.121](https://www.facebook.com/allen.roth.121)

[kavya.reddy20](https://www.facebook.com/kavya.reddy20)



[alleniroth](https://www.linkedin.com/in/alleniroth)

[kavya-suram-698b6698](https://www.linkedin.com/in/kavya-suram-698b6698)



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Thank you!