Managing Volunteer Fundraisers Using a Blackbaud CRM™ Portal

blackbaud
DEVELOPERS' CONFERENCE
June 15–17, 2021

BLACKBAUD CRM™ TRACK

ALLEN ROTH, KAVYA SURAM

Session Host: Trevor Kelly

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- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users

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…

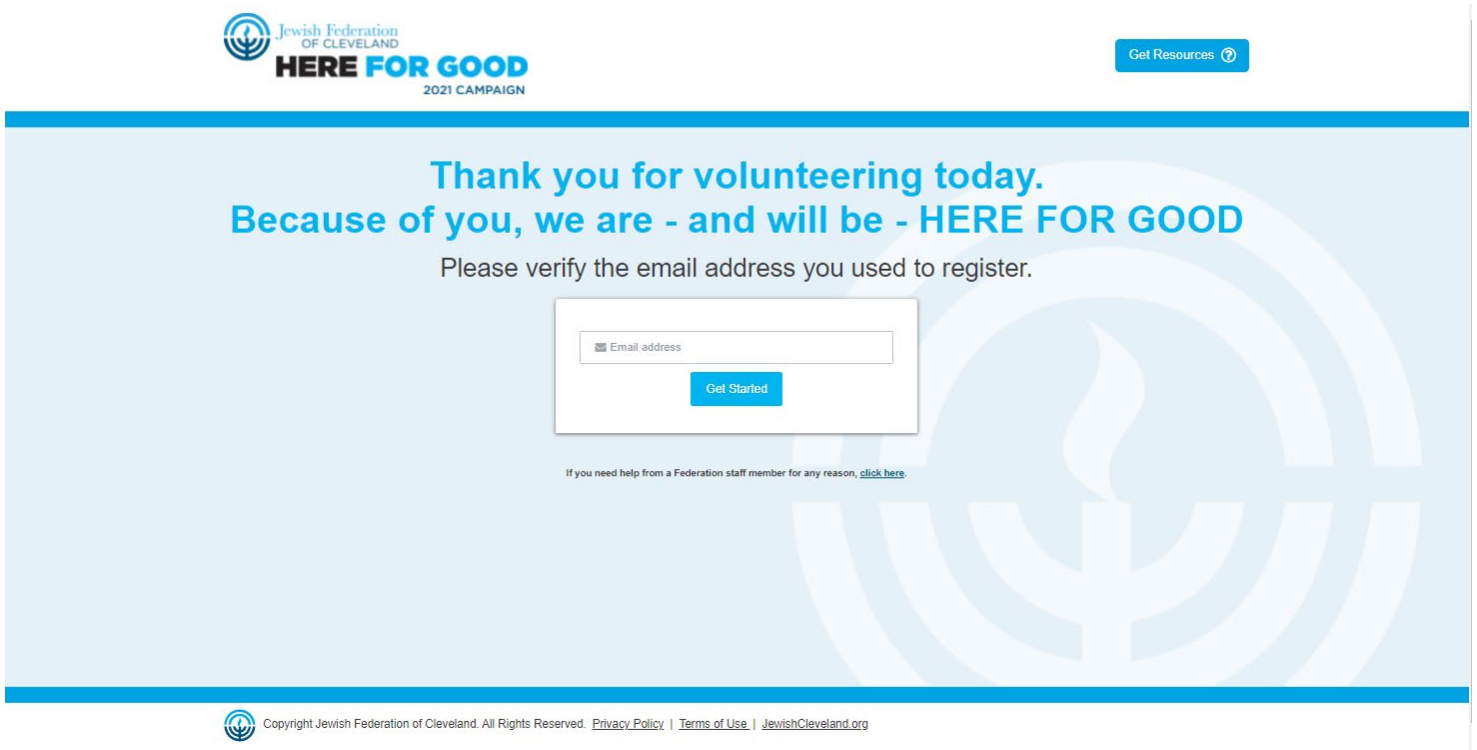
- Caller ID: Donors ignoring unknown numbers
- People are communicating via other methods
- Volunteers have their own cell phones
- Making more calls to get less gifts
- COVID-19: Cannot be in-person!

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”



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!

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And…

Design & Build it in 6-8 weeks!

“Happy path” flow

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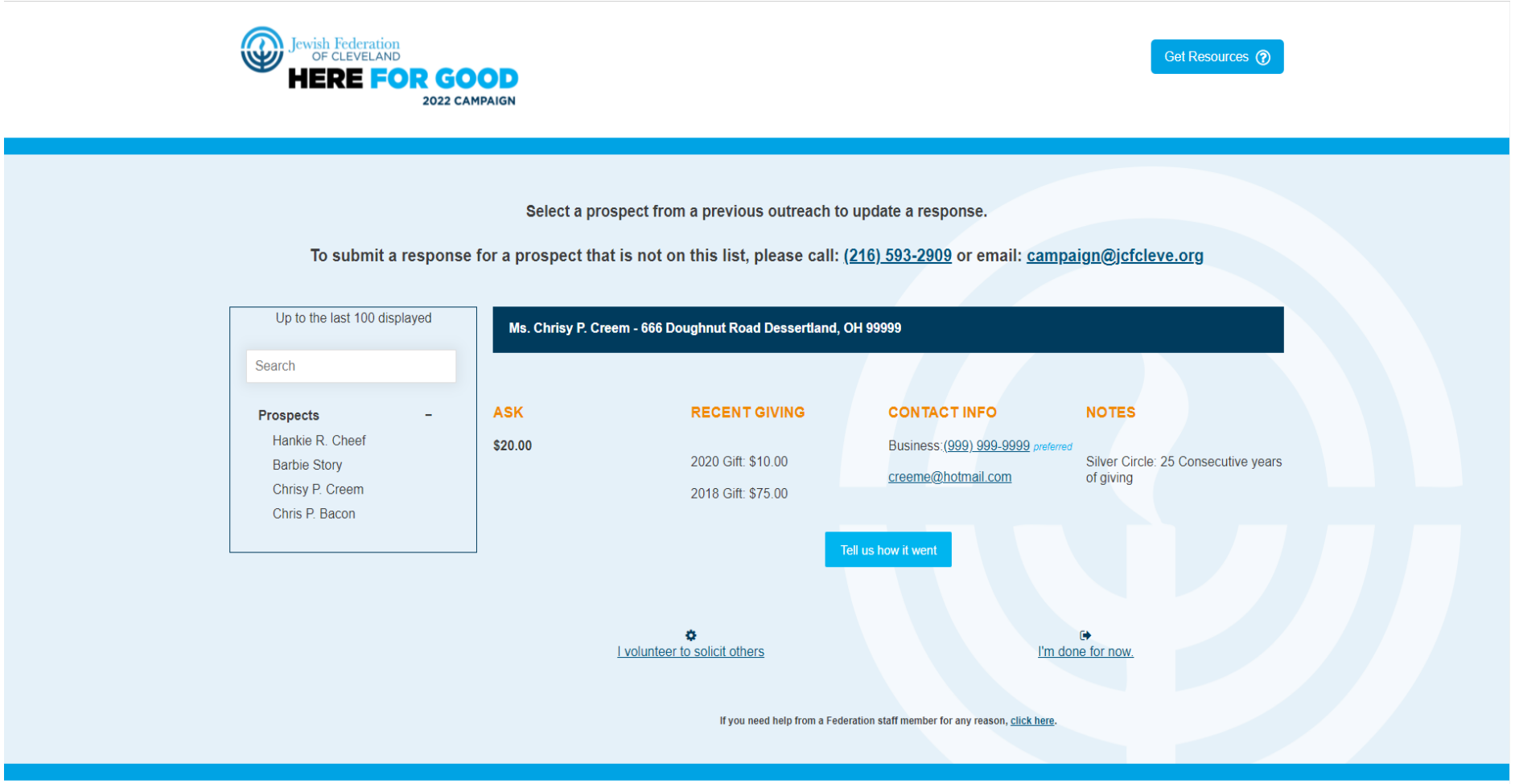
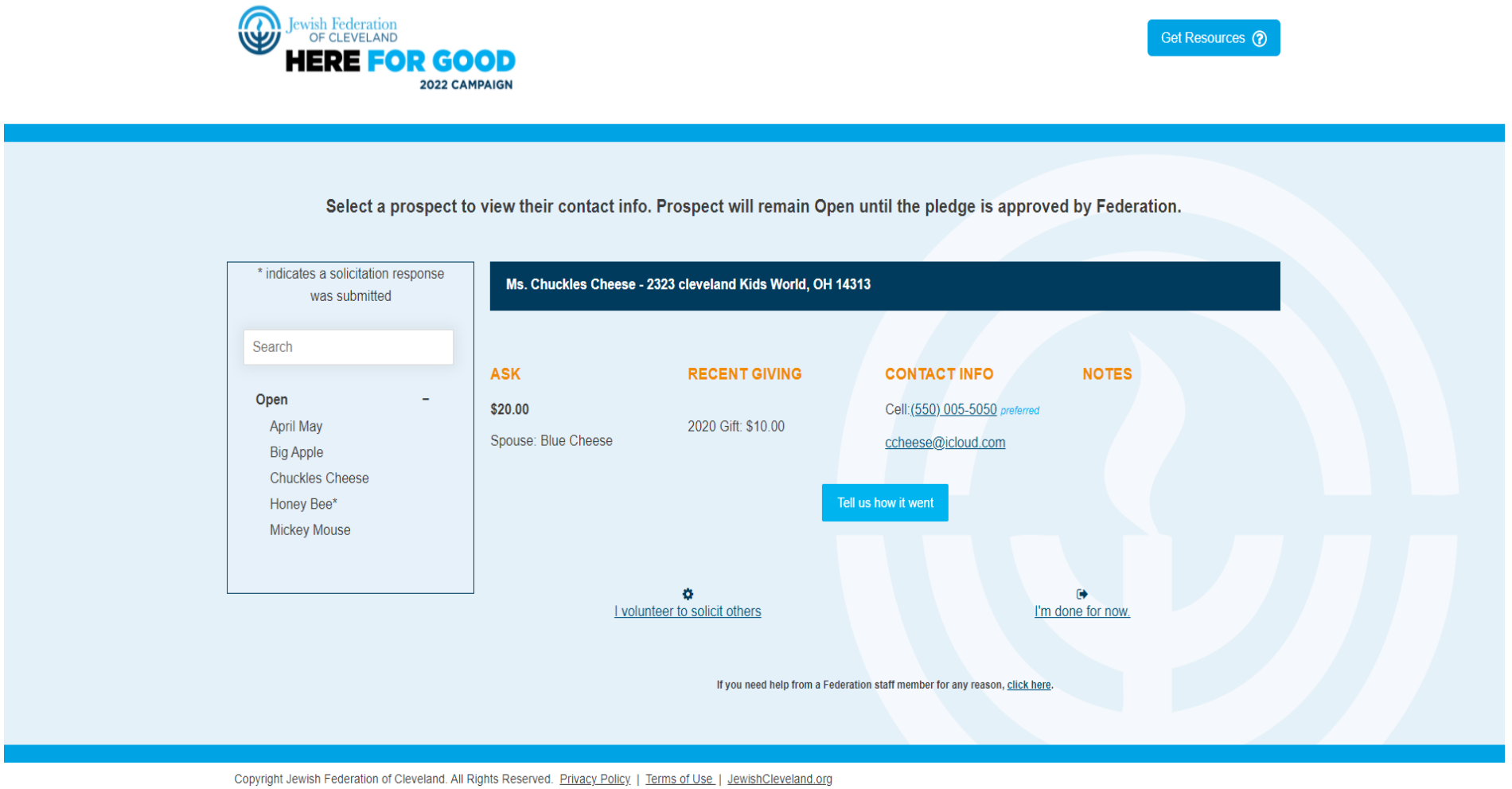
Demo

Previous responses page



Assignment's page



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: https://donate.jewishclevelan
Redirect to Pledge Card: ☑
Maximum Ask Amount: 500
Redirect URL to Pledge card on success: https://donate.jewishclevelan

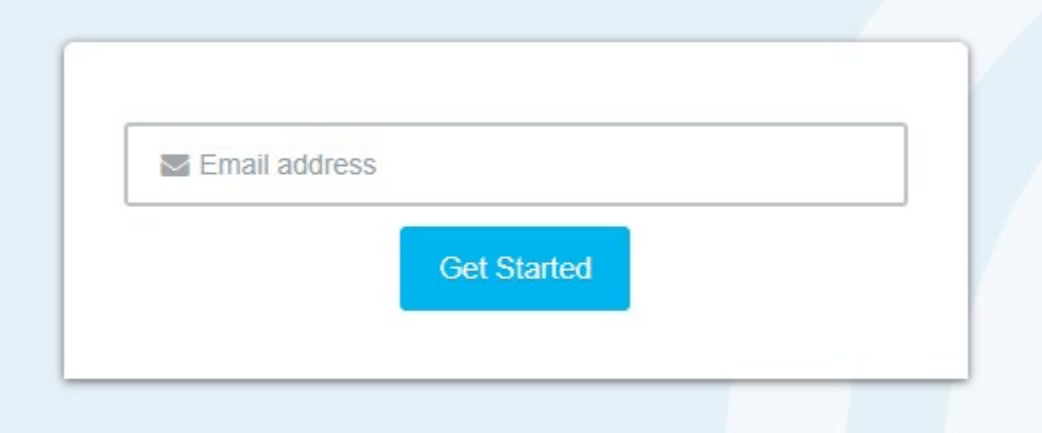
Campaign: 2021 Annual Campaign
Update Campaign:
Search

Error Messages
Email Not Found: Email not found
Email Address Required: Email address required
Multiple Constituent Account Matched: More than one constituent exists v
If Compare Email to URL Constituent ID is checked
Invalid Constiuent ID in URL: Please use the link provided
Invalid Constituent Account Matched: Please enter the email you used t

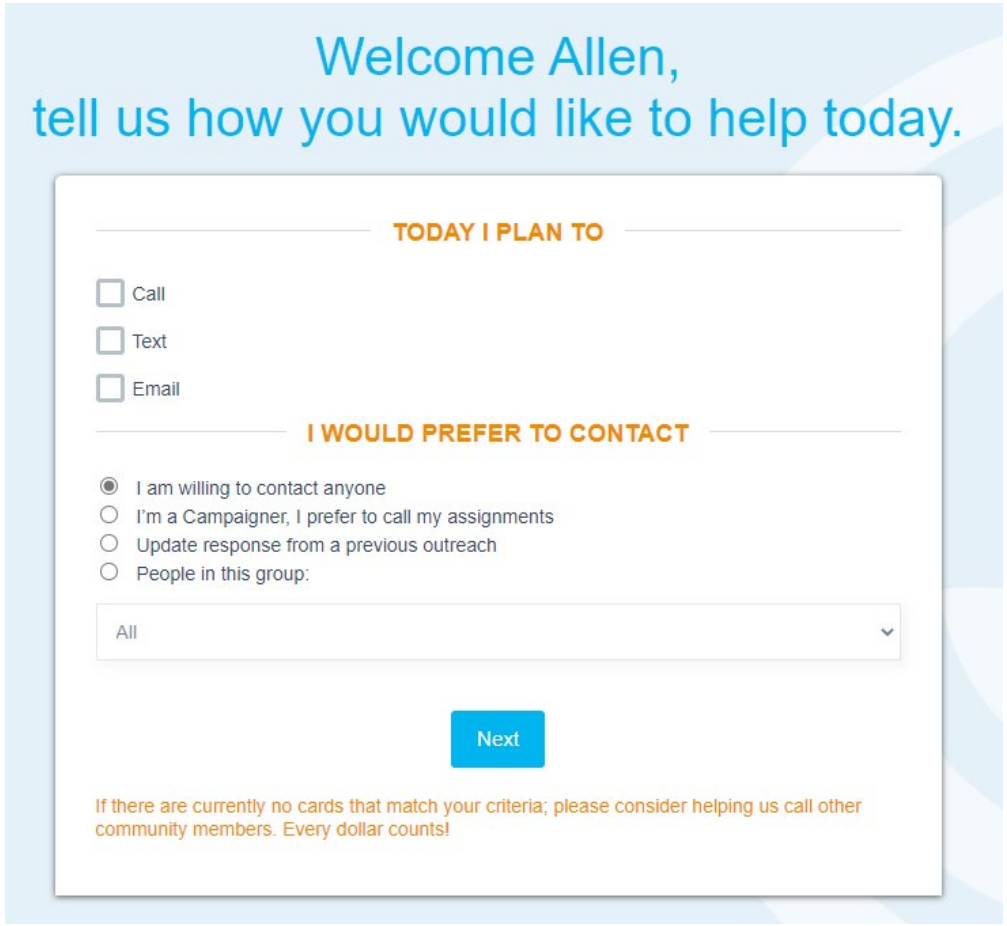
Configure portal timings: ☑

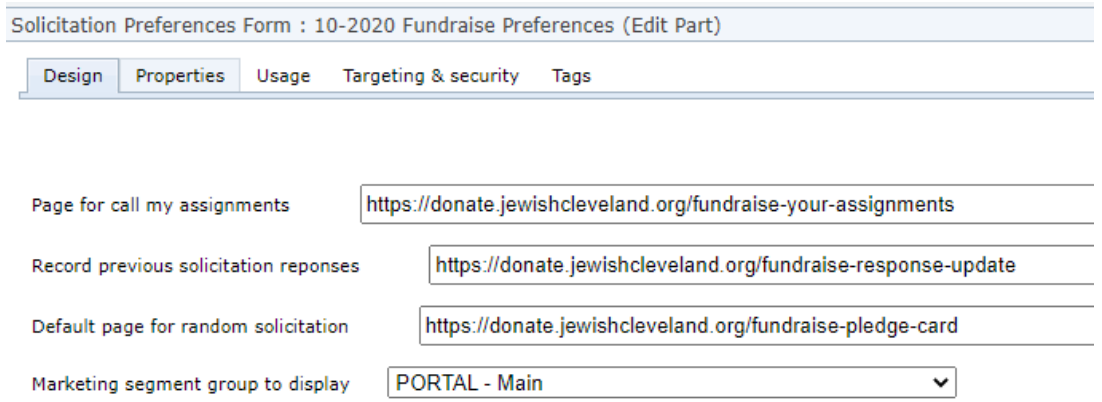
Day	Start time	Close time
Sunday	12:00 AM	12:00 AM
Monday	12:00 AM	12:00 AM
Tuesday	12:00 AM	12:00 AM
Wednesday	12:00 AM	12:00 AM
Thursday	12:00 AM	12:00 AM
Friday	12:00 AM	12:00 AM
Saturday	12:00 AM	12:00 AM

Redirect URL when portal is inactive: https://donate.jewishcleveland.org/volunteer-portal-unavailable

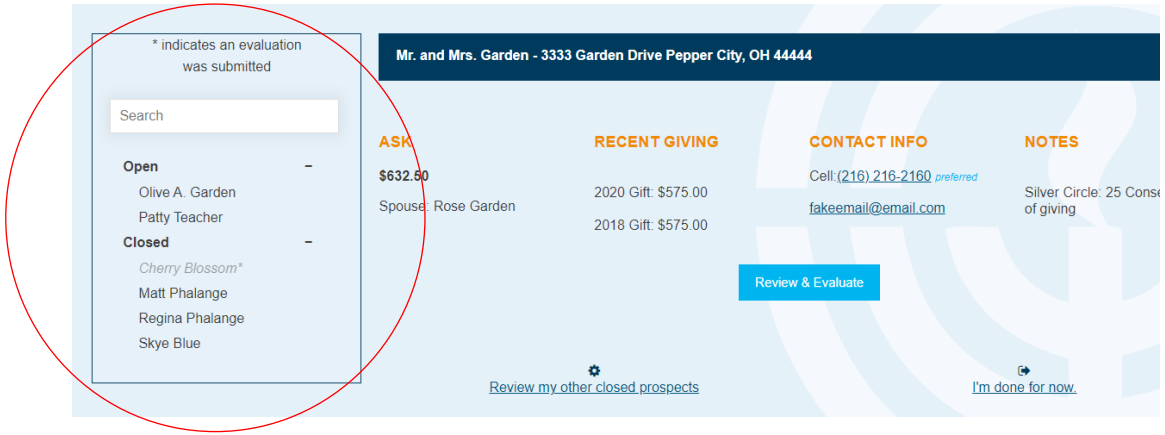


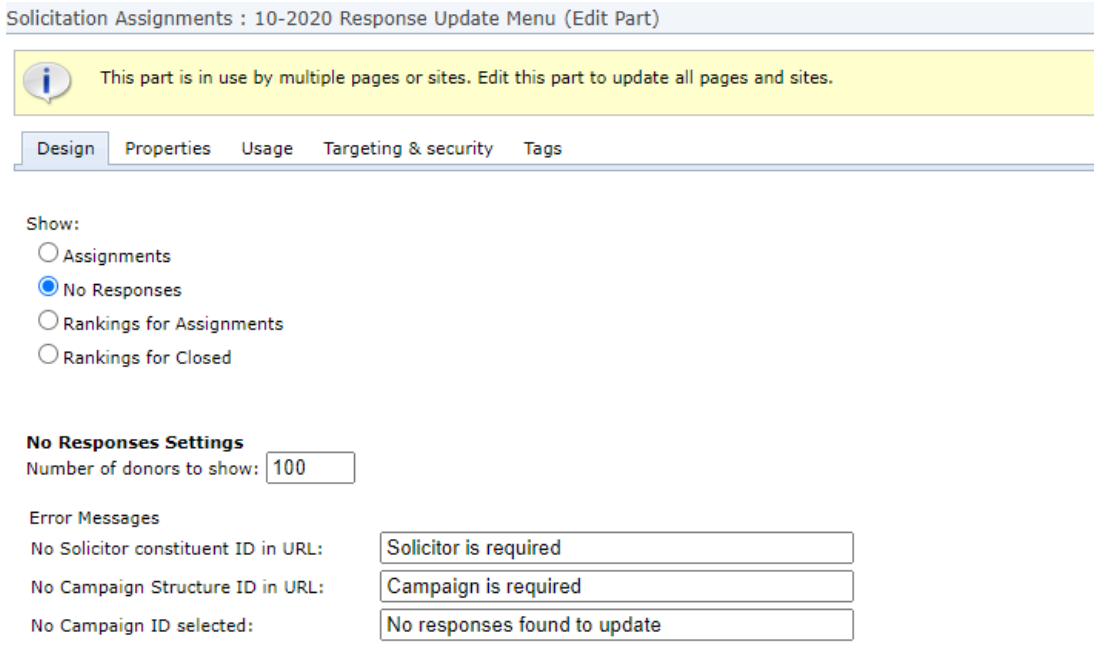
Volunteer preference part



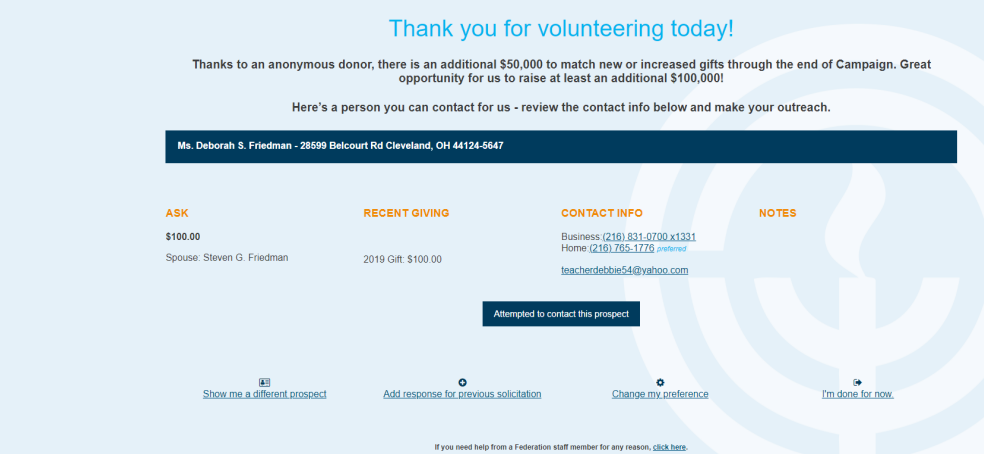


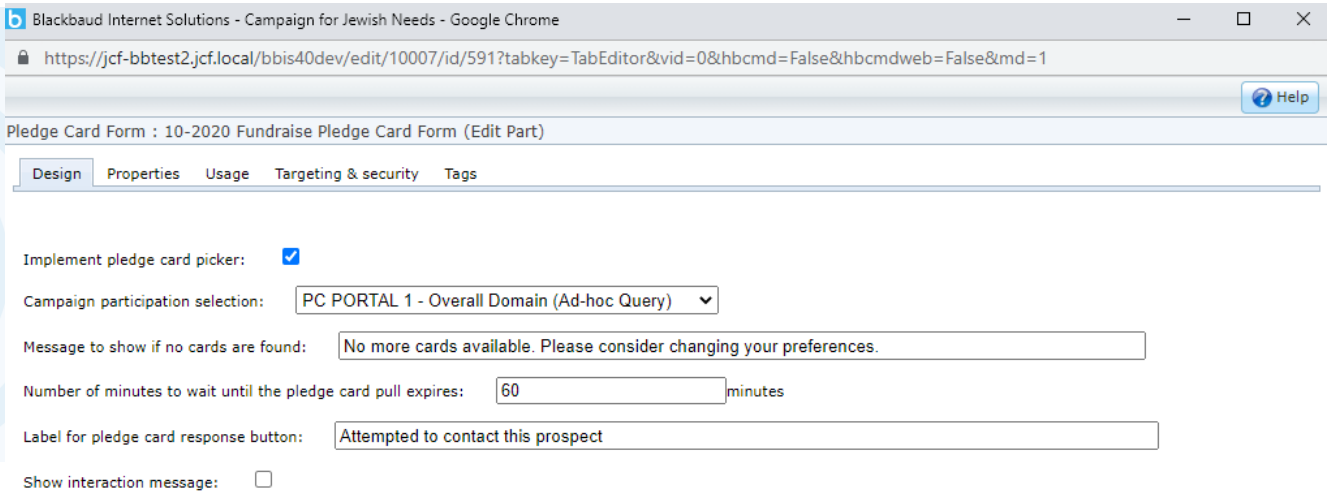
Prospect listing part



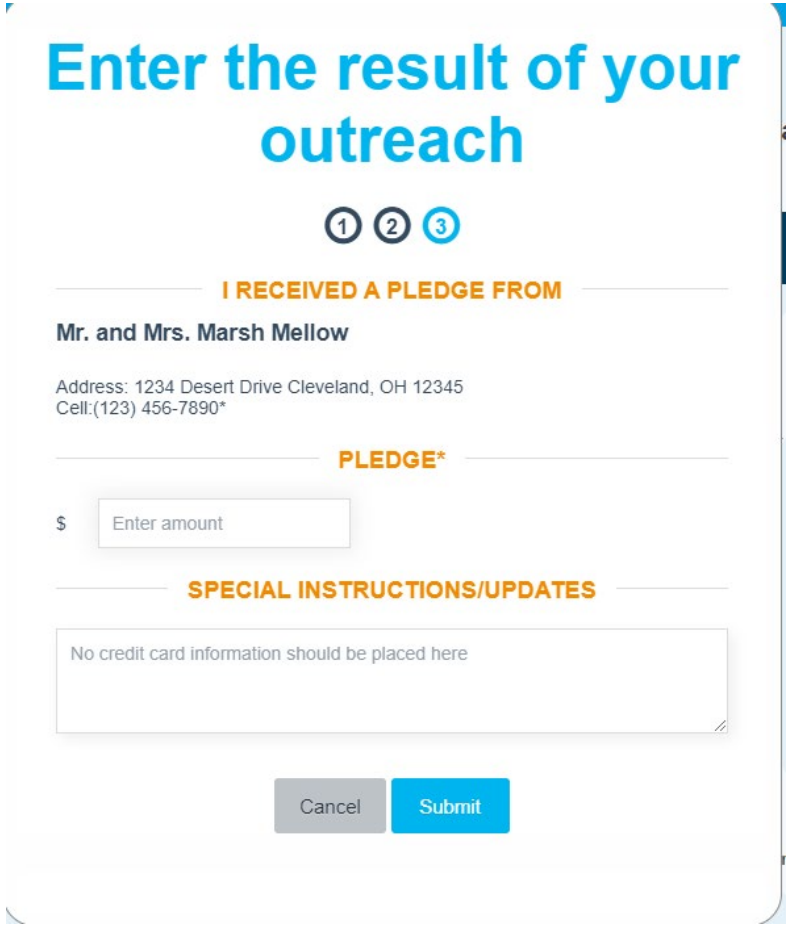


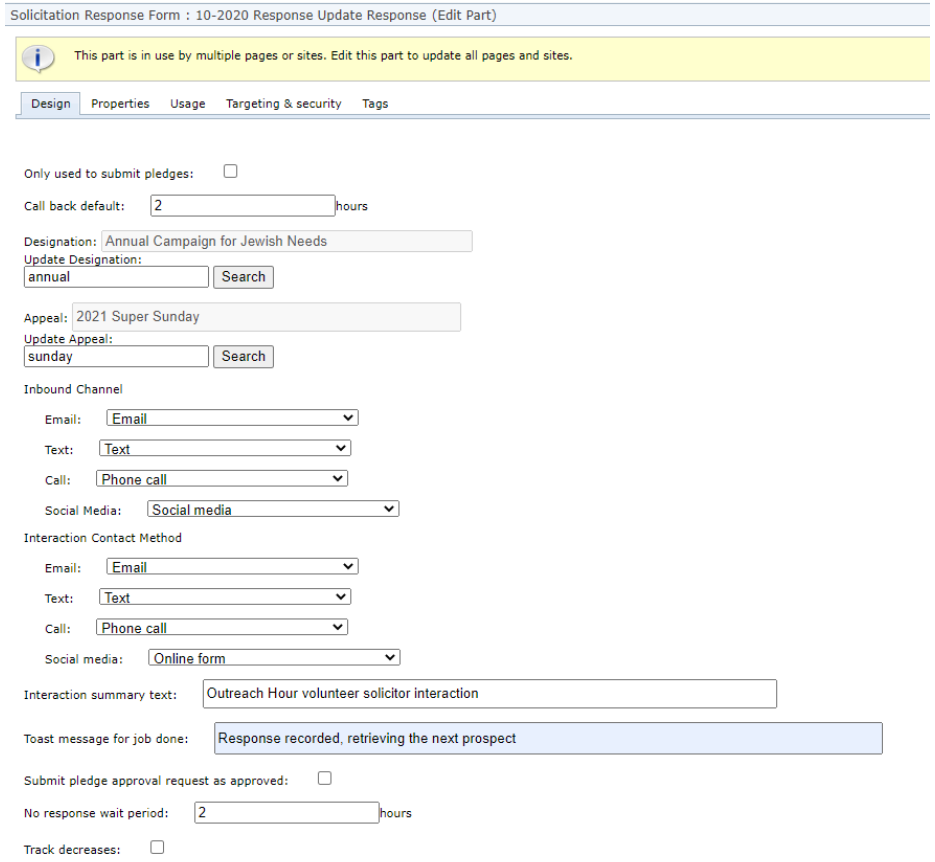
Random pledge card generator part





Response part





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

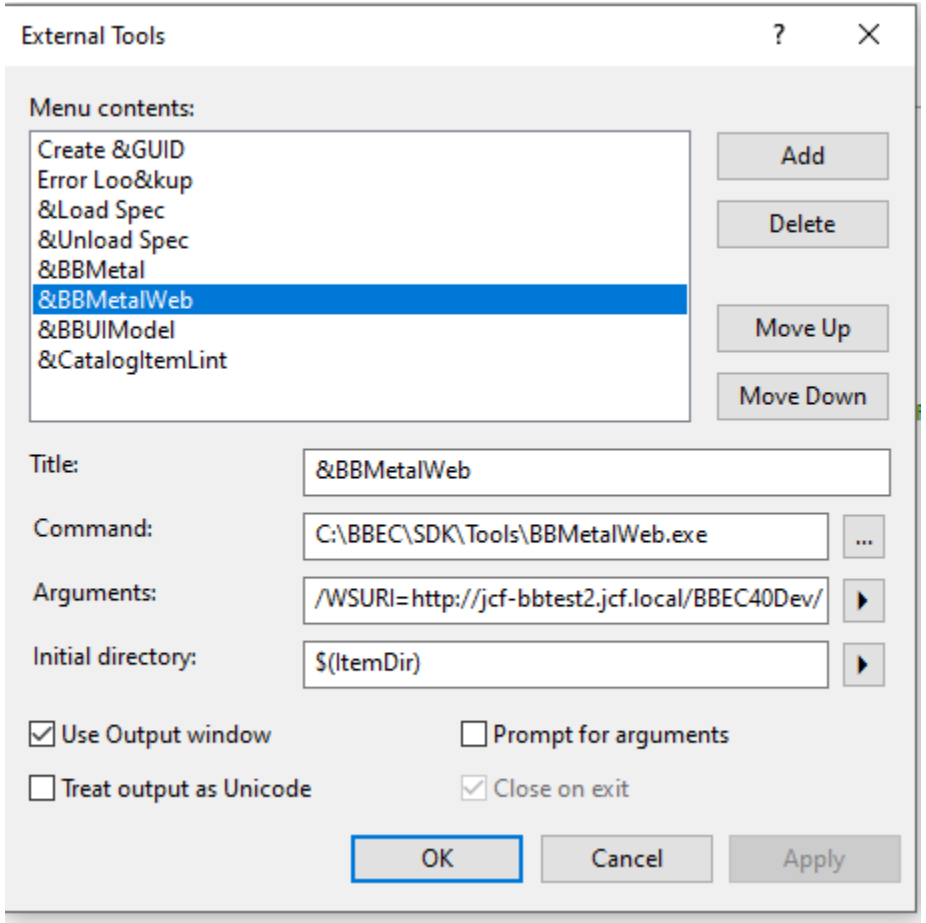
How to deploy

- 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

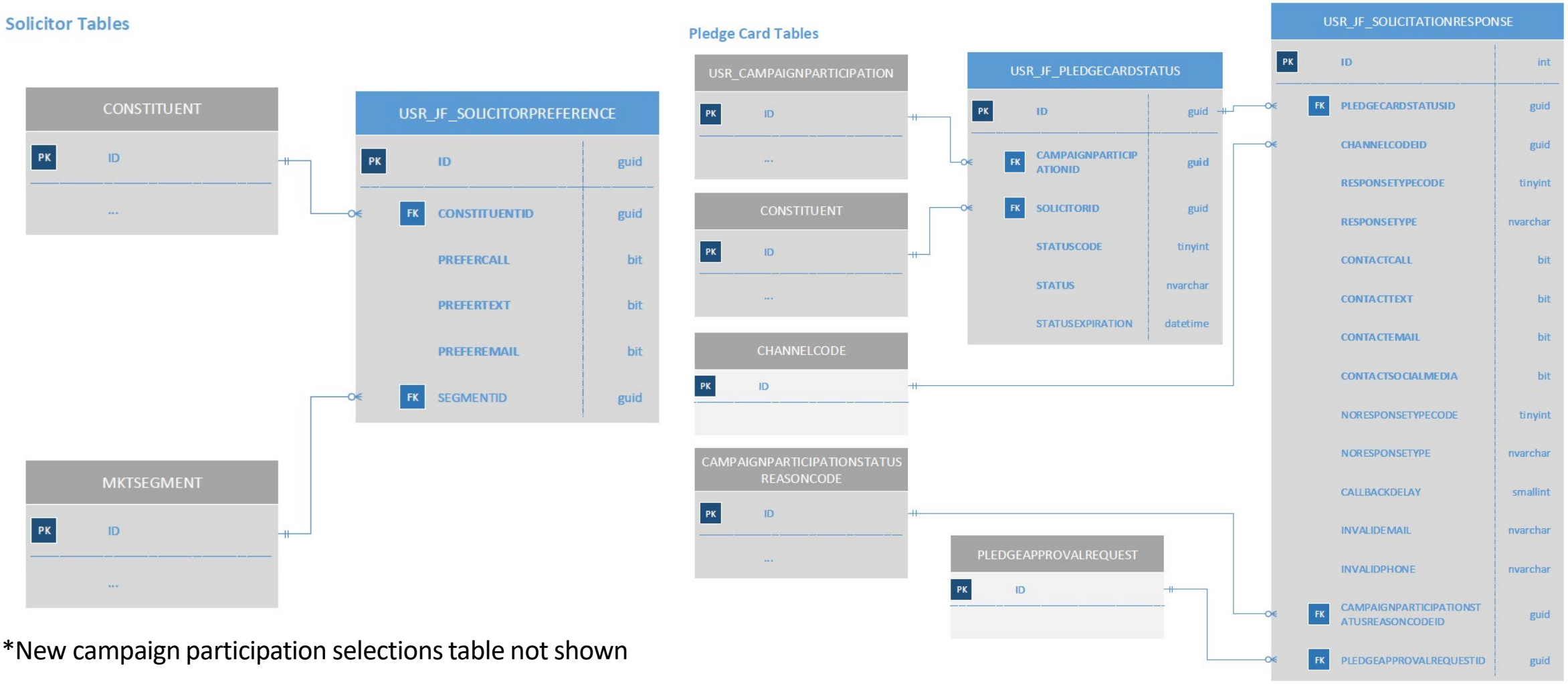
Out of the box CRM component

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

'Getting the constitent 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)



*New campaign participation selections table not shown

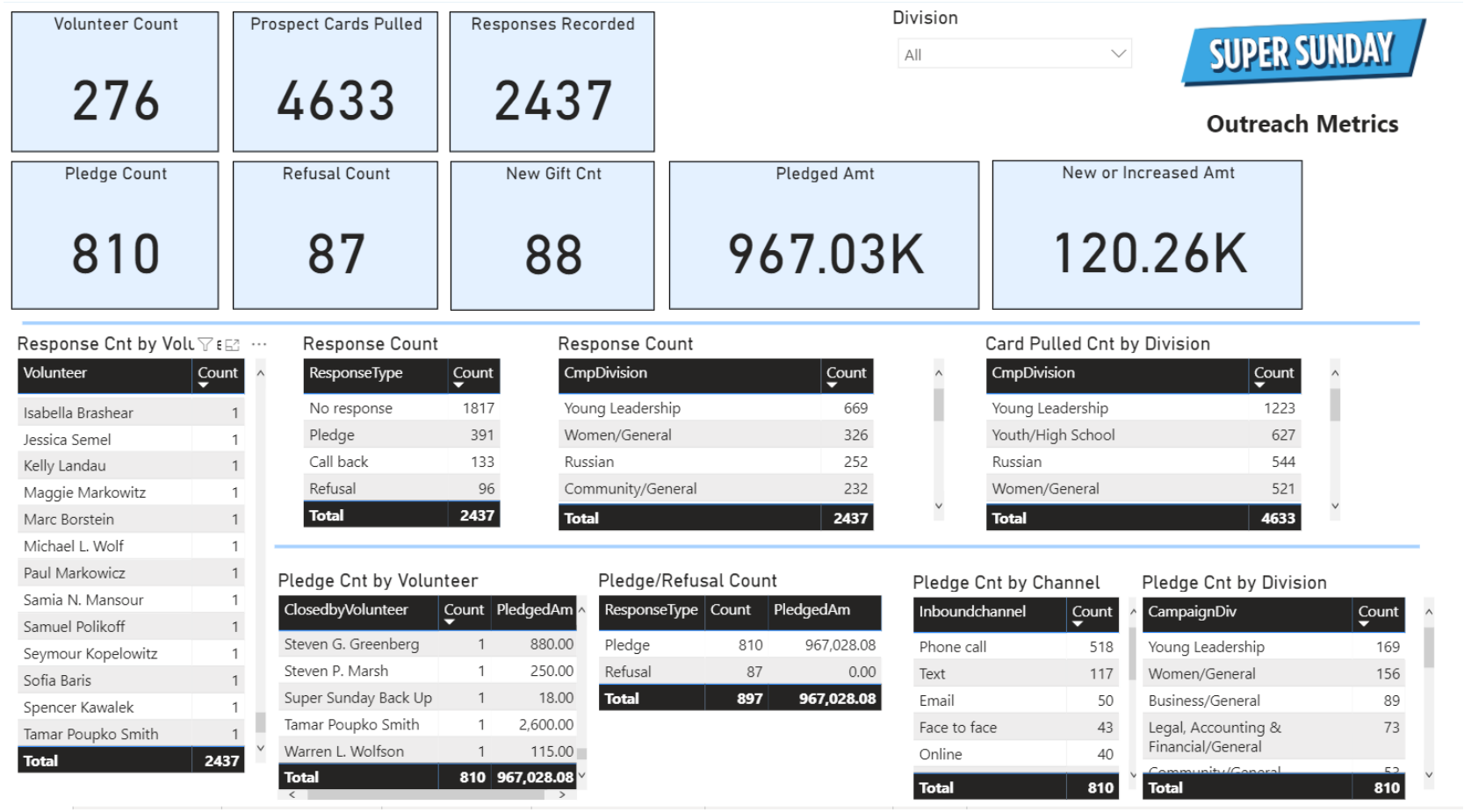
SDK components within CRM

- 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

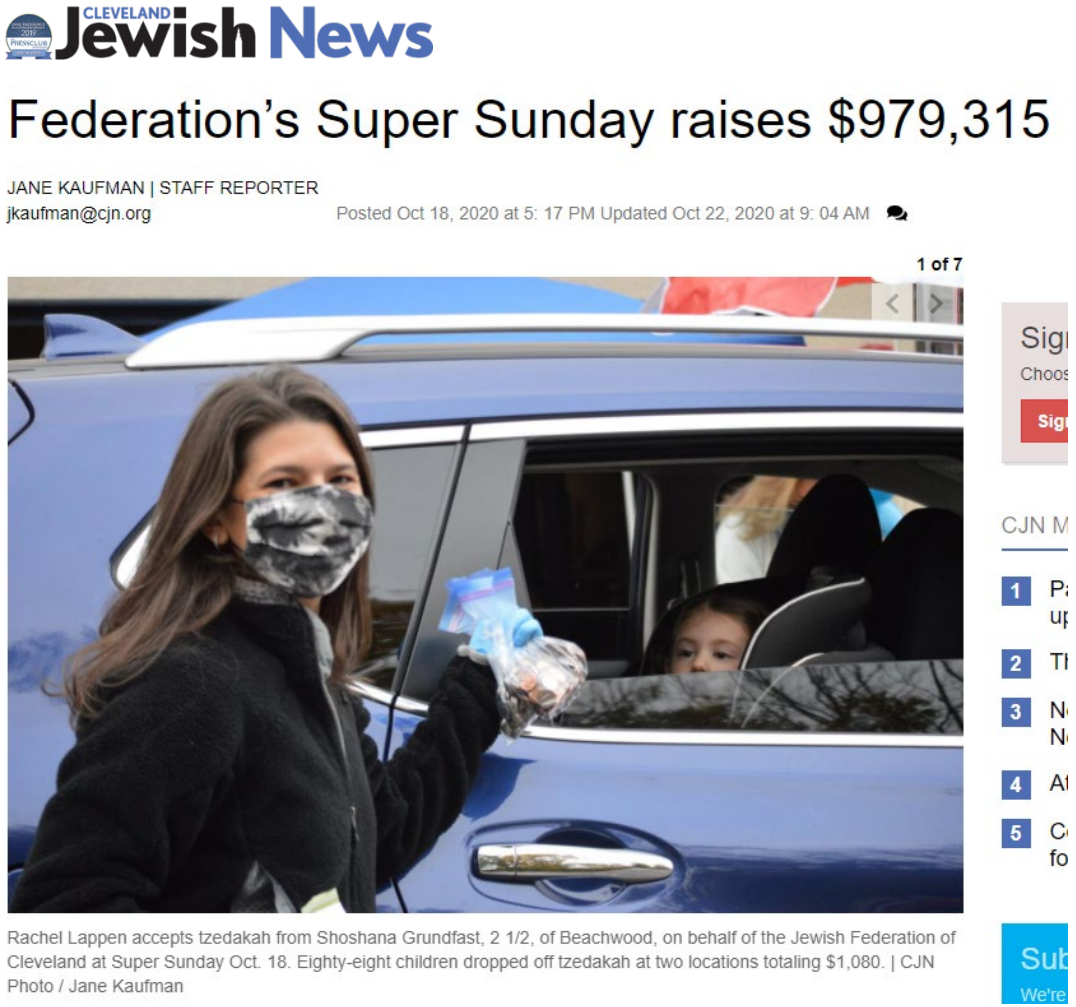
- Custom parts were built on the Microsoft ASP.Net platform .
- Code is written in Vb.net.
- Database – Microsoft SQL server 2014 CRM database
- Client-side scripting – JavaScript, jQuery, ajax.
- Web page design – HTML, CSS for styling.
- CRM SDK specs
- Dashboard – PowerBI and OData

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

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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

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.

QUESTIONS?

Let's Connect

@aroth1330

@kavyareddy11

@allen.roth.690

@kavyasuram

allen.roth.121

kavya.reddy20

alleniroth

kavya-suram-698b6698

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Thank you!

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