Blackbaud Stewardship Management™

Implementation Overview

Stewardship Management Implementation

The following document provides an overview of the Stewardship Management implementation process. Since Stewardship Management is a highly configurable solution, the implementation can vary among clients based on their needs and processes.

The goal of Stewardship Management is to improve communication between administrators, fund contacts, and donors. This communication happens by moving all your information—award recipient information, donor acknowledgements, fund balances and performance—into the same system, Stewardship Management. During the implementation process, we will make *best practice* suggestions to improve system usability and work to ensure that we are meeting your goals and objectives.

Stewardship Management Implementation

First, we'll create an implementation team. That team will likely consist of:

- **Blackbaud Business Analyst**
    - Serves as your primary contact with Blackbaud during implementation
    - Also serves as your consultant and project manager for the next several weeks (i.e., until you have successfully launched Stewardship Management)
- **Campus Advancement/Donor Relations Coordinator**:
    - Should be the person most familiar with the management of funds and donors on your campus
    - Serves as our primary contact throughout the implementation
    - Should be prepared to provide information about your current stewardship processes (fund performance reports, contact information, etc.)
- **Other Contacts**:
    - If your organization has Blackbaud Award Management, we recommend including a current scholarship administrator and/or Financial Aid representative
    - Should be prepared to provide information regarding Award Management setup and Financial Aid processes

Implementation Milestones (Tasks)

The milestones for your Stewardship Management implementation may vary slightly depending on your process and overall needs:

- **Implementation Kick-Off Call**:
    - You meet your Business Analyst (BA) and begin a high-level discussion of Stewardship Management, project milestones, timeframe, and the project plan
    - BA conducts an abbreviated demonstration of Stewardship Management *(potentially)*

- **Award and Recipient Field Discussion**:
    - BA populates your system with the basic field information
- **Fund Import Discussion**:
    - BA provides examples of summary fund information
    - You submit files with information related to your funds (fund performance reports, etc.)
    - BA imports fund information into your system
- **Contacts Import Discussion**:
    - You and your BA have discussions about donor contacts and information requirements (most likely involving your existing CRM)
- **Fund Data and Field Visibility**:
    - BA loads fund data
    - You and your BA discuss any additional fund-related fields for donor contacts
- **Contacts Data and Field Visibility**:
    - BA loads contact data
    - You and your BA discuss any additional contact-related fields for Stewardship Management Administrators
- **Data Clean Up and Fund Snapshots**:
    - BA configures and populates your system
    - BA removes any unused data
    - BA teaches you how to:
        - Take “Fund Snapshots” to provide curated fund performance reports to donors
        - Publish award information for donors (recipients, etc.)
- **Discussion and Review**:
    - You and your BA review site configurations and make final changes
- **Invite/Notify Contacts**:
    - You invite contacts into your system to view the Donor Portal, which contains donor, recipient, and fund-related information tailored to each donor’s interests and donation history

Implementation Milestones (Timeline)

Milestone	Duration	Responsibility
Implementation Kick-Off call	1 business day	Blackbaud and Client
Stewardship Management overview session *(and Award Management as applicable)*	5 business days	Blackbaud and Client
Award and recipient fields import and customization	10 business days	Blackbaud and Client
Fund import and customization	20 business days	Blackbaud and Client
Contacts import and customization	20 business days	Blackbaud and Client
Configure fund visibility permissions	10 business days	Client
Snapshot funds and fund history *(as applicable)*	5 business days	Blackbaud and Client
Configure contacts visibility permissions	10 business days	Client
Data cleanup and publish snapshots	10 business days	Blackbaud and Client
Connect contacts to users *(as applicable)*	5 business days	Blackbaud and Client
Publish most recent snapshots	5 business days	Client
Invite/Notify contacts	5 business days	Client