



The Raiser's Edge NXT Transition

A Leadership Opportunity, Not Just a Technology Change

For nearly a decade, Blackbaud has been moving organizations from the legacy Raiser's Edge NXT database view to its modern web experience. In September 2027, support for database view and related database-view-dependent functionality will end.

Blackbaud has made clear that no data migration is required. Constituent records, fundraising history, and organizational information will remain within Raiser's Edge NXT. For nonprofit leaders, this is an opportunity to step back and ask a strategic question:

Are our advancement operations designed for where our organization is going—or simply built around how we have always worked?

Look Beyond the Technology

Many core fundraising functions are already available in Raiser's Edge NXT web view. The areas that may require the greatest attention are often behind the scenes, particularly advancement reporting, queries, importing, exporting, analysis, gift processing, and other processes that have historically relied on database view.

These functions are essential to how leaders understand fundraising performance and make decisions.

The Blackbaud technology transition may expose processes that have become overly complicated,

inefficient, or dependent on individual staff knowledge. This transition provides an opportunity to evaluate workflows, clarify roles, eliminate unnecessary steps, strengthen reporting practices, and determine how emerging capabilities, including expanded analytics and AI-enabled tools, might support staff and advance the mission.

It is also an opportunity to ensure that critical knowledge does not reside solely with a single staff member or within processes that have never been formally documented.

Don't Wait Until the Deadline

September 15, 2027 may sound far away, but successful transitions take time.

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Organizations should begin now by assessing what the transition will mean for their specific environment. That means looking beyond a list of software features and asking practical questions:

- Which current workflows depend on database view?
- How does our advancement team currently use queries, reporting, imports, exports, and analysis?
- Which processes will need to change?
- Are there existing workarounds that should be eliminated?
- What new Raiser's Edge NXT capabilities could improve the way our team works?
- What knowledge or responsibilities currently reside with only one or two staff members?
- What training will our team need?
- What should be prioritized first?

A transition is also an excellent reason to review all Blackbaud-related processes, even those that are not directly affected by the move. Technology changes can expose inefficiencies that have been accepted for years simply because “that’s how we’ve always done it.”

Where The Phoenix Philanthropy Group Can Help

At The Phoenix Philanthropy Group, we bring professional management and organizational expertise to complex advancement challenges. We can help nonprofit leaders take a strategic view of the Raiser's Edge NXT transition by assessing current processes, identifying areas of risk or inefficiency, and establishing priorities for change.

Our role isn't simply to help an organization “move to web view.” It is to help leadership understand what needs to change, why it matters, and how to manage the change effectively.

That can include:

- Assessing current Raiser's Edge workflows and database dependencies
- Identifying critical reporting, query, import, and export processes
- Recommending process improvements and opportunities to streamline work
- Establishing priorities and realistic implementation timelines
- Clarifying staff roles and responsibilities
- Helping teams prepare for changes through training and change management
- Identifying opportunities to make better use of Raiser's Edge NXT capabilities

Start Now. Don't Start From Scratch.

The good news is that your organization does not have to undertake a massive data migration. Your constituent data, fundraising history, records, and organizational information remain within Raiser's Edge NXT. But no data migration doesn't mean no transition. The work is to understand how your organization currently operates, determine what will change, prepare your staff, and make deliberate decisions about new workflows and capabilities. Starting now gives your organization time to learn, test, train, adjust, and improve, rather than reacting to a deadline.

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If your organization uses Raiser's Edge NXT, now is a good time to begin your transition assessment.

Natalie Graff, Advancement Operations, and Evelyn Sheckler, Advancement Data / Prospect Services consultants for The Phoenix Philanthropy Group, bring more than 30 years of combined experience with Raiser's Edge and Blackbaud products, along with expertise in project and change management. Our team can help you understand what the move from database view to web view means for your organization and develop a practical plan for getting ready.

To schedule an introductory phone call with The Phoenix Philanthropy Group experts, email info@phoenixphilanthropy.com.



Five Things to do to Get Started

- 1 Identify a change leader
- 2 Inventory database-dependent workflows
- 3 Assess Reporting
- 4 Engage staff
- 5 Create a transition roadmap