

The Art and Science of Running a K–12 Private School

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One of the big goals I had was to get everything on the cloud, get rid of servers, and not have to worry about updates. Blackbaud has afforded me what I needed to get there.

—Director of Technology Carol Vila, Belen Jesuit Preparatory School, Miami

Managing the complex inner workings of a private K–12 school is challenging, to say the least. Rarely is there an easy and quick way to make improvements, or even know how to identify the areas that need improvement. Those who do it well recognize it as a true ‘art and science.’

Blackbaud is the world’s leading cloud software company powering social good, and we know that K–12 private schools are building a better world by preparing learners for lifelong success. We equip these schools to deliver on that mission by providing software, services, data intelligence and expertise.

In partnership with Educational Collaborators, a national consulting organization providing edtech and professional learning services to schools and districts, we created this exclusive eBook. *The Art and Science of Running a K–12 School* provides a holistic view of the qualitative and quantitative aspects of school operations, including insights, the latest trends, and real-life examples of how fellow school leaders are delivering an exceptional K–12 school experience

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The Dalton School: A Case Study

About seven years ago, the business office at **The Dalton School** in New York City was frustrated with their financial software and wanted to switch to a unified school-wide solution. School decisions are typically made collaboratively, and some departments already were using Blackbaud. The business office decided to implement Blackbaud's Total School Solution, so the school could manage their enrollment, student information, learning management, athletics, website, tuition, and fundraising in a connected system.

Director of Dalton's New Lab for Teaching and Learning, John Neiers said different departments were using Blackbaud products here and there, such as Raiser's Edge® in fundraising, athletics, and the school website. But the academic area was using Moodle for their LMS and another product for their SIS. All together, the school was using about 30 different databases, he said. Thankfully, the staff has several folks with strong data skills.

Today, Neiers said, the school is down to about eight or ten databases, a reduction of 75% that they are able to connect or integrate behind the scenes. They are getting more data consistency over time. In all of these areas, the faculty, staff and administration appreciate having a full set of data, with rich insights and dashboards provided



in Blackbaud, using the API and exporting. “We’re using Microsoft Power BI to do some data visualization, and I think that is a huge benefit,” he said.

Neiers was given a short timetable to do the system conversion. With a dozen people in the IT department and 300 faculty and staff to train, they would need help. They determined the High School and Middle School faculty would be the first to acquire learning. He asked for High and Middle School teachers to volunteer to be trained to learn the system, and in return teach four to five colleagues each, typically in their own department. Thirty-five teachers volunteered, with a \$1,000 stipend for their efforts. The coaches then had a checklist of what their colleagues needed to learn. When all the assigned colleagues signed off that they knew how to do these skills, the volunteer trainer received the stipend.

“They (the teachers) know their learning styles, and the process felt more grassroots than top down,” Neiers said. “I told them, ‘You are the best teachers in the world’ and gave them flexibility to do it on their own timetable and learning style.” This process built a team of learners, he said, and teachers could ask their colleagues or the technology team for help when they needed it. Dalton enrolls about 1,300 students in K–12 classes at three locations.



Similar stories come from many other schools that have moved from using one or more Blackbaud products to Blackbaud's Total School Solution. A school that uses a Blackbaud solution gets the sky/cloud infrastructure instead of individual products. Rather than having to create bridges or write and support code to go between systems from different companies, all the connections are made and maintained. Open, modern APIs allow the whole system to stretch and grow. And this provides the school with data and tools to make better informed, more timely decisions.

Open APIs and extensibility help integrate other records into one experience and allow the school to automate more of their actions and reporting. Having one common ID used across platforms

allows unique software with unique data that is all tied together with the common ID.

The savings of staff time and money are tangible benefits, while the consistent user experience simplifies work for students, parents and faculty as well.

In recent years, many private and independent schools have had increasing enrollment, but are not able to hire extra staff to support the increase. The automation aspects of robust technology systems like Blackbaud have helped to fill that human gap. Assisting existing staff to do their work more quickly and accurately has impacted their workload and saved on personnel costs. Having off-site servers, cybersecurity, and continual updates has saved time and effort for IT staff as well.

This eBook shares stories from different perspectives from other schools who have also come to this decision to use Blackbaud's Total School Solution. The five chapters cover:

- Student and Parent Experience
- Admissions and Enrollment
- Financial Aid and Finance Office
- Fundraising and Advancement
- Leading a Tech-Savvy School



Each of the chapters includes insights from the IT staff and leadership, such as the school's Chief Technology Officer or Chief Information Officer, as well as those directly involved in the job role. Depending on your own role at your school, one of these chapters may speak specifically to you. Those in senior leadership roles will find useful information throughout. Those interviewed for this eBook also provided tips for others facing similar challenges in each chapter.

Building on more than 40 years of experience supporting thousands of the top private and independent K–12 schools in the U.S. and Canada, Blackbaud's Total School Solution delivers three pillars for successful school management:

- 1.** Eliminates operational silos to enable collective strategy and collaboration among core school offices.
- 2.** Unlocks a unified and consistent user experience for students, parents, and faculty.
- 3.** Serves as the data foundation, improving insights for better decision making.

Blackbaud's Total School Solution enables private K-12 schools to manage their enrollment, student information, learning management, website, tuition, financial aid, finance office, and fundraising in a connected system, using cloud-based storage and industry-standard security. The integration of these essential school-based services maximizes efficiency while also providing better tools for quality education, more informed administrators, and more engaged and loyal families.

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One thing I think Blackbaud does very well is they listen to the customers and look to improve. That's one of the reasons we have stayed with Blackbaud for so long.

—**Technology Director Jeff Gaier,**
Archbishop Moeller High School, Cincinnati

The Art and Science of Running a Streamlined Student and Parent Experience





The pandemic shifted communication between parents, teachers, schools, and students to digital channels, a necessity of the times, especially while students were learning remotely. No more flyers stuffed in backpacks or quick chats at dropoff/pickup times. The right Student Information System and Learning Management System combined with other technology tools helped improve communication with families and continue to do so.

Matthew Herrera was hired in summer 2018 as Director of Information Technology at **Westtown School** in West Chester, PA, the oldest, continuously operating co-educational day and boarding school in the country. The leadership team immediately asked him to research an all-in-one software solution to replace the school's existing student information system. One of the primary goals of this project was consolidating important information into a single platform for parents, students, and employees so they would no longer have to seek that information in multiple places (website, email, student information system).

Westtown selected Blackbaud's Total School Solution™ in the summer of 2019. Implementation started in late 2019. In February 2020 they rolled out their online enrollment contract and then began configuring the Blackbaud Student Information System™ (SIS). When the pandemic struck in March 2020, the implementation process was so far along that the school had no choice but to proceed.

Despite the unfortunate timing, Herrera says the implementation went smoothly. They were able to get all the core aspects of the system up and running by the beginning of the 2020-2021 school year, and they have expanded and improved their use of the solution since that first year.

"I communicated to the community that it is an iterative process," he said. "Circumstances change, and you need something that you didn't need three years ago. Now we are iterating." The ability to customize and connect Blackbaud's EMS and SIS allowed them to keep pace with the rapidly changing times.

Blackbaud's Total School Solution™ allowed Westtown to realize its goal of providing a single source for essential information for parents, students, and employees. Through the school portal, called MyWesttown, community members can access both data that is specific to them (grades, class schedules, athletic schedules, online forms) and general information about the school, including student support resources, handbooks, campus event calendars, and online directories. Even information shared via email, like the weekly "Just the Facts" messages sent out by each divisional principal, can be accessed through the Pushpage archives published in the Resource board. "Whatever information they need, they can find it in MyWesttown," said Herrera.

At New York City's **Dalton School**, communication to parents focuses on bulk messaging, community groups and topic pages, through Blackbaud Total School Solution. Parents found it was easier to find content when they needed it.

The communication features for parents shift from when students start Kindergarten to late middle school. "We try to wean parents from academic oversight" in the upper grades, says Tech Director John Neiers. "Parents don't need to see assignments as students get older. Bulletin boards for elementary and middle school students are viewable, but not in high school, where it's a teacher/student space."

He also said that parents do not have access to the Gradebook. As a progressive school, Neiers said, "We emphasize learning. Not all teachers use the Gradebook, and we don't require it." The Gradebook can be a communication tool, he said, with messages that "something is late" or "something is missing" as the way of working. Dalton enrolls about 1,300 students in K-12 classes at three locations.

Hopkins School in New Haven, CT, has found powerful changes in communication and information via their Blackbaud SIS implementation starting in 2017-18. They had hosted their website, Hopkins.edu, with Blackbaud since 2005 and had used other pre-cloud Blackbaud products. Initially,



two colleagues, Director of Technology D.J. Plante and Associate Director of Communication Jemma Williams Nussbaum, pitched moving everything to Blackbaud. The real push was for online grades and comments visible to parents. Students wanted more grade transparency. Williams wanted to better communicate with parents. By implementing the SIS and more of the Blackbaud products, they moved to the Blackbaud Total School Solution.

When the new SIS came in, Benjamin Taylor, long-time physics teacher, became Director of Academic Technology and joined forces with Plante and Williams. The three of them became a powerful team to unify how the school communicated with parents.

“We made lots of features come alive,” Taylor said. Scheduling software. Learning Management System tools built in. Using Resource Boards effectively with groups. Messaging families through built-in tools about weekly happenings. “My primary goal was to have all the information about the major work that students need to do in one place, so that advisors and students could get access to that information,” even though some faculty were reluctant to make changes. Taylor noted that the “missing assignments tool” is a great feature of the gradebook.

Over time, little bits of policy were added to get increased use. “We’re helping our school move into using these built-in scheduling systems more effectively, to streamline that process, communicating course enrollments and giving kids access to their digital schedule sooner. We’re trying to get to the point where we can get really crucial information about hiring and scheduling more quickly,” he said.



Tech Director Plante cautioned that tech folks have to be careful about screaming “Hey, this is cool!” They need to work to show value to the user. He first implemented some official notes in a simple way that tied together all the people connected to a student. Before, someone looked up names of seven teachers and possibly left someone off an email. That little shift was a huge plus, and users started seeing the value.

Taylor said they focused on features that would save time on administrative tasks so staff had more time for the necessary things. A big benefit from Blackbaud’s SIS: working toward a world where classes aren’t islands. Teachers can gain insights, such as “My exam average is quite different from a colleague teaching the same course” or “I have a lot more assignments than a colleague in my department.” As the academic member of the trio, Taylor said Department Chairs were skeptical at first, but now say, “I need this, and I need my faculty to use this so we can get better.” He emphasized that this is not as a “gotcha” for teachers but rather a way to support them. Now, when a family takes issue with something, the school has a long “paper trail” of assignments and information. Best of all, they are getting accurate information into the hands of those people who most need it.

This changed how the school communicates with families. The newsletter now has a summary in a push email, Taylor explained. But parents have to log in to see the full content. “We can put more in there securely when they have to log in,” he said.

Williams started working on the school's website 13 years ago. "I believed in the Blackbaud system from the beginning," she said. "When I saw what the School Website and Content Management System (CMS) could do, I saw the value of this."

She said it helped to make sure Resource Boards were useful tools, and to build website pages for prospective families. "Think of all the audiences," she advised.

The school released course enrollments to parents in June, "inside and behind the password" as a carrot to get them to log in. The school's weekly newsletter, @Hop, is behind the password. "I have the data on who is clicking the links," she said. Parents access from 60% to 70% of the content.

A landing page that looked professional and interesting was a tipping point for people to take it seriously. Visual appeal matters, such as having all the tiles the same size and an attractive color scheme.

"We keep drawing people back beyond the password," she said. "If there's nothing there, parents have no reason to go there. Create a community expectation that everything is behind the password." Initially some parents who had been at the school were resistant, but new parents were ok, as they knew what to expect. She compares it to logging in for online banking, something familiar to parents.

"We have continued to improve on our messaging," she added. "We have gotten better at communicating between islands. Improved internal communication and tools through Blackbaud help us as a whole school to communicate better and share information that is important to people."

She also noted that they protect the identities of minors on the website. For example, they do not post rosters of teams but created a sports center behind the password for each season. While parents are at a game, they can log into the site on their phone and see who is #15 who just scored. Safety and security are the big drivers of this decision.

They decided that assignment grades would not be visible to parents but are to students, advisors and teachers. Students need to know when they missed an assignment. For the high school students, only teachers and administrators can view the calculation of the final grade, a customization enabled by Blackbaud's SIS.

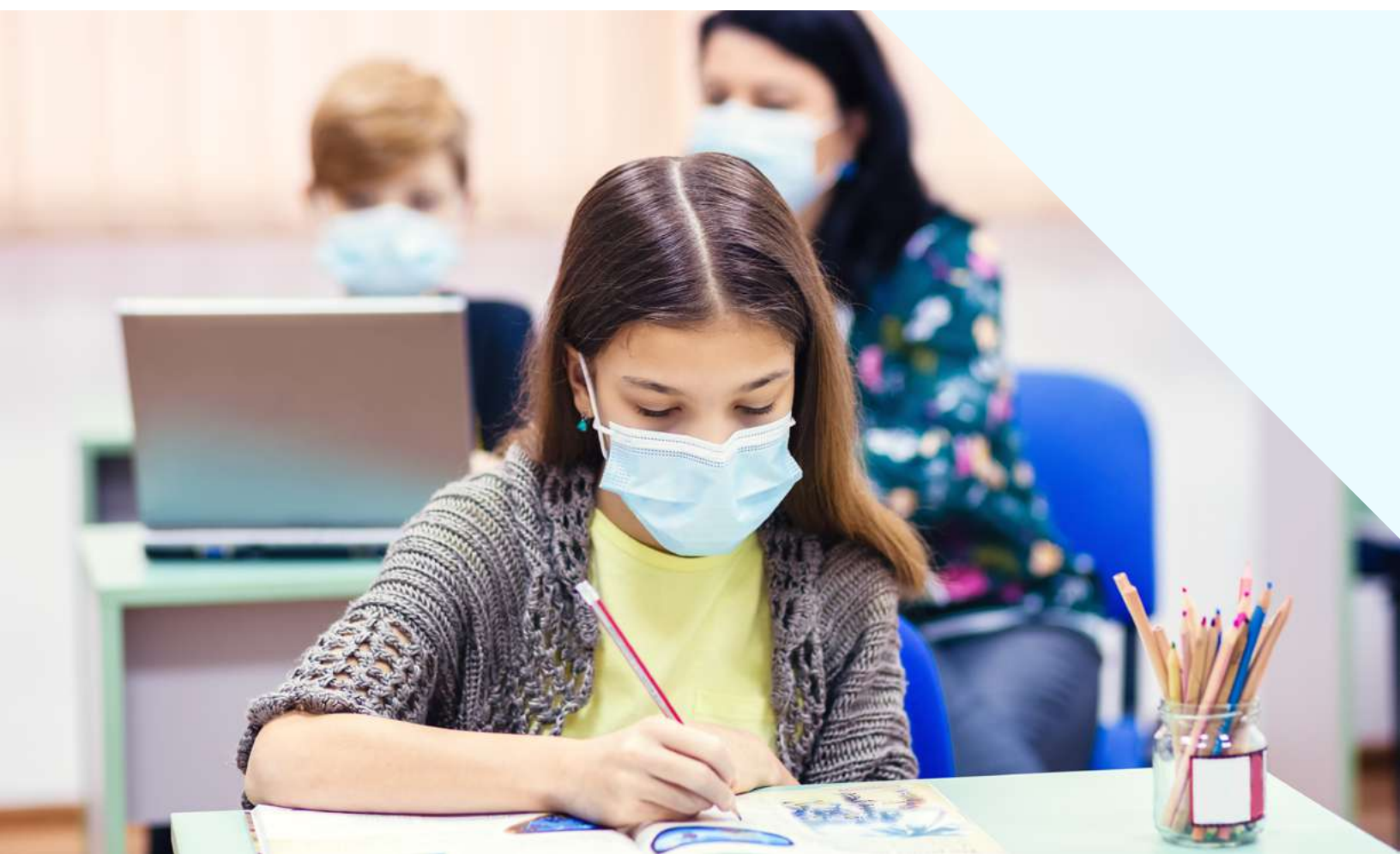
Plante says that one of the most important things this system has done is to provide accurate information to more faculty and staff across campus. It's easier and quicker to see how a student is doing and available to people running things at the school. "Compared to our old SIS, it's a huge improvement, more open to people who need the info to make decisions," he said.

For the initial shift, a committee of faculty and students worked together to determine the school's needs and initial plan for LMS requirements. Faculty are expected to post major assignments to Hopkins.edu to populate the calendar. The Head and Dean of Academics were asked to support this requirement. The Head believed in the decision and thought the requests were reasonable. Smaller changes were supported by the Dean of Academics, Dean of Faculty, and Department Chairs.

They have specified minimum things that need to be on a teacher's class page. "Nuances add up to a substantial amount of change," he said, "and some have been less democratic." He said it was important to make sure the whole community is involved and then evaluate where there could be progress in baby steps. Big change needs buy in, while small tweaks have to be timed, using data to support the decision.

For other schools contemplating this shift, tech director Plante said it's important to have a team to implement it and a dedicated database administrator. Everyone needs to know who's the team leading this change. He said that Taylor did a great job as cheerleader for the academic stuff. Others need to cheerlead other features of the system.

Countless K-12 private schools use Blackbaud's SIS to easily manage attendance, academic records, schedules, grading, and much more. Combined with Blackbaud's Learning Management System, it provides a 360-degree view of all student data to elevate confidence that records are accurate and that parents and other users can easily access information they need.





The tools available through the Blackbaud system just help us as a whole school to communicate better and to really share the information. ”

—Jemma Williams Nussbaum, Hopkins School

Tips

- 1** Put information in a single archive with an obvious organizational strategy so parents don't have to scroll through texts or emails to find information.
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- 2** Ask whether parents prefer emails or texts and give them the ability to "opt out."
.....
- 3** Expect that some less tech-savvy parents may need tutorial videos.
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- 4** Get students to help parents in learning the tools.
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- 5** Are you in broadcast mode or conversation mode? Parents seek two-way communication.
.....
- 6** In faculty meetings, celebrate people who are doing this well, how well it impacts student lives and connects with parents.
.....
- 7** School leaders need to create time to do family engagement work.
.....
- 8** Put some information for parents behind a password so you can track who is accessing the information and how often, providing feedback on your communications
.....
- 9** Have a Communications person to help both on the inside and the outside.
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The Art of Operating a Successful Admissions Office





When IT teams up with Admissions, they can really improve processes.

About six years ago, Susan Dunlap was asked to create a schoolwide admissions system at **Southside Christian School** in Simpsonville, SC. Before that, each Division Head of the K–12 school – elementary, middle, and high school – did their own admissions. “They operated in siloes,” she said. A family might have three children, each in a different division, and calculating family discounts was just one of many issues. They had different ways to track prospects and to communicate with families. If someone inquired about the school and didn’t fill out an application, there was no follow-up. They wanted to have metrics and be more aware of their data.

Dunlap started working at the school as Volunteer and Partnership Coordinator seven years before, so she knew the school, which enrolls about 1,300 PK–12 students southeast of Greenville.

Her business and marketing skills from a prior position at Clemson University meshed with the tech skills of Sheila Wyer, IT Support, in making a successful move into a technology-assisted process. Dunlap started by learning what was being done in admissions and enrollment at the school, what worked and didn't, and thinking about what could be centralized. "We wanted to see what we could take off the plates of others" at the school, she explained. Her title changed to Executive Director of Enrollment Management.

"Together we crafted the process," she said. "Sheila was involved from the start with the IT technical side." About a decade before, the school had used paper applications. A committee including the Head of School, teachers and others came up with an admission process, after brainstorming best practices. But at that time, no one really was in charge of schoolwide admissions.

Before Dunlap was appointed, the school used a legacy software platform for the first online application process, but coordinating across departments was challenging. Despite Dunlap and her team attempting to fine tune processes in that platform, when the school started using Blackbaud Tuition Management™ in the fall of 2020, they decided to switch providers. Blackbaud Enrollment Management™ was the last thing they implemented.

At first, there was a lot of self-teaching and discovery in making the switch. With two years' experience now, "We see a lot of potential to expand what we are doing, a natural progression of baby steps," Dunlap said.

"I love the capability of the checklist, to customize checklists and cater to our unique admissions process. I love both the customer-facing things and things for Admissions' internal use behind the password." She noted that the checklists help parents see where they are in the process and what's still needed.

A hidden benefit is that prospective parents who move forward and enroll a student already have experience with the software. "They have already logged in and become familiar with the flow," she said. "They know where to go and what to do."

Dunlap says she also likes the reporting. "It's easy to query simple reports and make user-defined fields, and building a report is much easier." She liked the SKY Reporting, especially the variety of filters, which help her get the data she needs.

Dunlap previously provided one weekly dashboard to the School Superintendent as they started accepting students, and Wyer created one to match that. "We need immediate data," Dunlap said. "Three hours' lag is ok, but not three days. Now, the head has become reliant on the dashboard to get the data he wants."



The Committee Review feature is highly useful, Dunlap said. She loves that she can build a committee and only the specified people can see the information, comment, and weigh in on the final admission decision. They have started using committees in other ways, such as athletic eligibility, which is “a big deal in our state,” she said.

Wyer created an athletic review committee. It automatically notifies the Athletic Director, and he can call the prospect. She said she may use it for a tuition assistance committee as well. That’s a huge positive, as they can start the conversation with a prospective family earlier and save time and money on paper forms as well.

Dunlap said the reenrollment process is also much easier now.

Wyer noted that every school’s admissions process is slightly different, so it’s important for admissions and IT staff to work together. Sometimes processes have to be changed to make use of the software. Sometimes other changes are needed.

The admissions and enrollment department works year-round and doesn’t really have a slowdown time, Dunlap said. “We will use tech tools even more as we aren’t getting more staff,” she commented.

Southside has an International Student Program with students from other countries who live with local families. Wyer said they had 35 students before the pandemic, many from China. She said that the challenges of Internet access in China meant that parents there couldn’t do everything online.



“Foreign contracts may add an extra headache,” she commented, “and you may have to complete those on paper.”

At **Xaverian High School** in Brooklyn, NY, Director of Admissions Kimberly Cruz was focused last school year on recruiting high school students (grades 9-12). Now, as Assistant Principal of Enrollment, she works with enrollment in the middle school (grades 6-8) and specialized studies program.

She started with Blackbaud products before they were in the cloud. Now she sees that Blackbaud Enrollment Management has streamlined the application process. Even so, she sees some parents have problems figuring out what to do.

“We always think we have ‘dummy-proofed’ the application form,” she said, “but somehow we need to have ‘helps’ flashing on the screen for a few people.” But, she noted, it’s easier now because parents can log in for one task and do everything in one place.

“It’s a great tool to collect contracts, integrate with the tuition site, and make it all in one,” she said. “It reduces the number of lists for different departments.” And of course different people want different reports for different lists. She noted this has become easier.

“We’re a tech-based school in general,” she explained, and the admissions committee is paperless. Everything internally is done using the Blackbaud system. She said that faculty members have access to contact information, progress, and attendance information on all students, not just students in their class or advisory. “Teachers are marked as responsible for a specific group of kids but can see everyone and compare to everyone,” she said.

Cruz said they use a student checklist for incoming students. The school might want to start class scheduling but doesn’t have academic records from the sending school yet. In that case, parents can upload a report card or transcript, and that has reduced a lot of paper.

Students interested in Xaverian start the application process in the fall. There’s an exam to take by December, and that’s uploaded into the system. In addition, applicants must provide academic records and recommendations. The scholarship committee meets. Students who are accepted get a letter in January with a full financial decision. They must register in February to hold their seat. In New York City, admission to specialized public high schools is typically announced in March, so by late March, students who will attend Xaverian must execute an enrollment contract and set up a tuition account, both online. Because of this, Registrar John Ronan explained, they actually have two contracts. One is the registration phase to “save a seat” and the other is the enrollment phase to pay a deposit.

Once a student is enrolled, Cruz said, a student checklist is generated with emergency contact forms, and the school can collect some additional information. When a student reenrolls, the school can get any updated addresses, updates on parent profiles, etc., and this information doesn’t have to be input manually, which is a big timesaver. They don’t allow parents to change information themselves because too often there is missing information.

“As we change things,” Cruz said, “parents are calling back and saying, ‘I don’t remember doing this online two years ago.’ Our shift has forced parents to be more familiar with The Harbor to check grades, read teacher announcements, etc. [The Harbor is the school’s password-protected site with learning management system (LMS) aspects of education management.] Getting them a login early has gotten parents more proactive about knowing how to use the system.”

Ronan recommended tackling new integrations with smaller groups rather than the whole school at once. He said they integrated with Blackbaud Tuition Management by starting last year with only the middle school, which is a fraction of the size of the high school.

“We try to ask questions like these: What are the immediate things we want to do digitally? What are tedious tasks that would save us the most amount of time?” he said. They learned what to do about the hiccups. This year, integrating with the high school is much smoother.

Another school that uses the Committee Review feature in admissions is **The Savannah Country Day School**. “The Committee Review feature has saved hours of work, but it really goes beyond that. Now committee members can review files on their own time, whether that be on a free period sitting under a live oak tree on campus or after school hours,” commented Business Analyst Josceline Reardon. In addition, this cuts costs and time of making paper copies of admissions files. The co-ed school enrolls about 1,000 K–12 students.

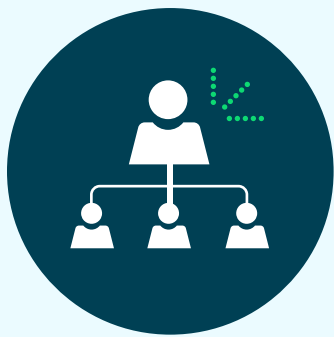
At all-male **Archbishop Moeller High School** in Cincinnati, having an initial interest form on their website makes a difference. The website says: *When you sign up for a MOEAccess account, you'll be able to complete the steps to apply. You'll also be able to: review shadow dates, register for the HSPT (8th graders only), communicate with the Admissions Office, see upcoming events, and check out Moeller news.*

Director of Enrollment Matt Weisenborn reported: "We really don't have to collect too much more information in terms of demographics after they fill out the initial interest form that creates the account. That gives the family the username and password that they will use from their first contact with us, when their son is still an eighth-grader, all the way to graduation."

Blackbaud Enrollment Management helps Weisenborn easily see what opportunities prospective families have pursued as they consider Moeller. "We can track how many events a particular family has signed up for—whether it's a shadow day, an open house, an information session, a tour. We can easily find that, and I can run reports to see who hasn't done what and follow up with those families."

Admissions and enrollment staff find that Blackbaud Enrollment Management provides powerful ways to connect with prospective students and families, to usher them efficiently through the application and acceptance process, and to pass on their information into Blackbaud Tuition Management and Blackbaud Student Information System™. An excellent online experience starts with a student's application. Once a student is accepted into the school, their enrollment record should easily transfer into the other systems without any need for manual entry, so information is instantly available to admissions, business, and departmental offices.





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Build a network of people in other schools who are a few years ahead of you in using the product, so you can ask for help from other users.

—Sheila Wyer, Southside Christian School

Tips

- 1** Interdepartmental partnership is essential. You need team members with expertise in marketing, finance and IT all willing to come to the table.
.....
- 2** Build a network of people in other schools who are a few years ahead of you in using the product so you can ask for help from other users.
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- 3** Approach the Blackbaud platform and admissions with a customer-centric view – not what’s easiest for the office staff. Think of the customer first!
.....
- 4** Take baby steps. Don’t try to change everything all at once. Blackbaud is a vast system, and you can do a lot of things. Pick one thing, do it, and later add more.
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- 5** Look for tedious tasks that technology can replace.
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- 6** Consider dashboards to provide more immediate insights to key decision makers.
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- 7** When you run reports that involve families, be sure to remove any “Sample” families, such as Pat Sample or Rosa Test, before you run the report.
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About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world’s leading cloud software company powering social good. Serving the entire social good community—nonprofits, higher education institutions, K–12 schools, healthcare organizations, faith communities, arts and cultural organizations, foundations, companies, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, data intelligence, and expertise. Learn more at www.blackbaud.com.





The Keys to Running a Profitable Advancement Office





When **Hopkins School** in New Haven, CT, says they have been a Blackbaud customer for a long time, they aren't kidding. They started using a DOS version of Raiser's Edge® and were license number two. The computer in the Advancement department was among the first computers on campus, and gift records go back to the mid-1980s. In fact, the school has had some consecutive-year donors for up to 40 years in a row.

"I can't imagine doing Advancement without a computer," said Associate Director of Advancement Services Dan Junkins. The school moved to Raiser's Edge NXT® in March 2018.

One of the reasons for the move is the efficiencies created by Raiser's Edge NXT that led to time-savings. Hopkins Director of Development Operations Lauren Reichart said: "In 2007 I used to run my reports from noon to 3 p.m. every Friday, and I would spend two to three hours a week reconciling and running reports. Now, it's great to be able to have it in front of you in a mobile profile."

Junkins reports that everyone has a dashboard, which he pushes them to use as much as possible. These include dashboards by fiscal year and fundraiser. “I get a lot fewer requests for spreadsheets, and I try to create a list with a link instead,” he said. The Head’s assistant has a dashboard to pull information, too.

Reichart shared that a former Director of Development loved the “back of the napkin number.” She said, “We spent hours doing this weekly, every February to May, instead of using a dashboard with open opportunities. The dashboards have created a lot of efficiencies. I can point to a very specific list and report, ‘We are at this point, and we know what the calendar says, as we come to the end of the fiscal year.’”

She added that this puts the information in front of those who would take action. “In the past, we would make a list and print out all the information and take it into a meeting, and it’s immediately outdated. It’s helped free up our time,” she said.

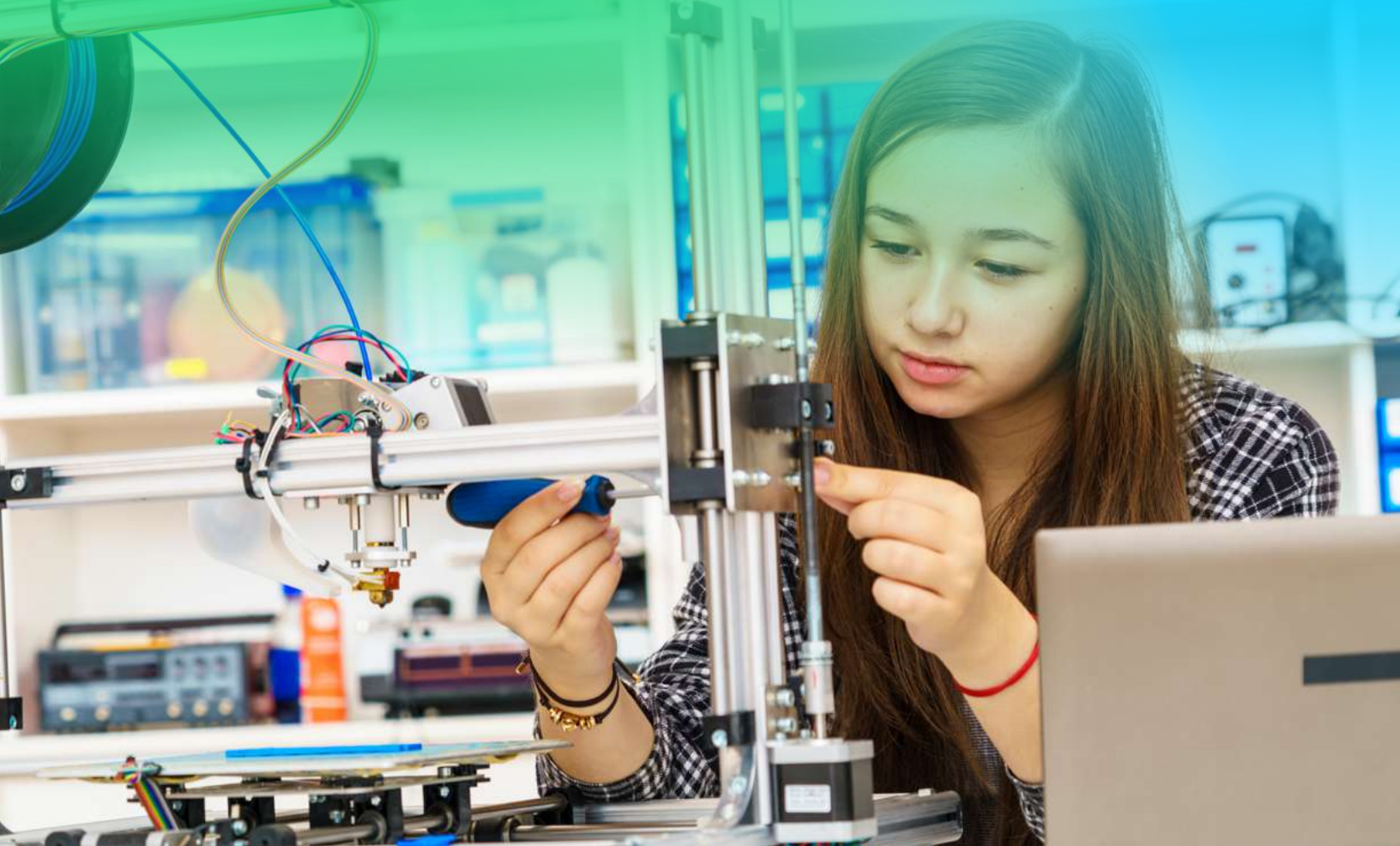
Time savings were also important at **Ashley Hall School** in Charleston, SC. Blackbaud automated a gift batch processing period that would have taken three days into a single step – one that only took an hour and a half. By saving this time, Ann Barnett, Director of Database Management and Online Services, was able to create more detailed reports using analytics to prove the value of the school’s spring phone-a-thon.

Ashley Hall enrolls more than 500 female K–12 students and offers a boarding program for grades 9–12. They use: Blackbaud Enrollment Management System™, Blackbaud Online Express™, Blackbaud Raiser’s Edge NXT, Blackbaud School Website System™, and Blackbaud Student Information System™.

The data analytics features of Blackbaud are crucial, too. “Blackbaud is so far advanced in terms of how we’re able to quickly access numbers, reporting, donors, and donor patterns,” said Assistant Head of School Elizabeth Calderon, **Mulgrave School** in Vancouver, BC, Canada. “It’s been really nice to see how those donors overlap with past capital campaigns and our annual fund as well—and being able to see that story on one screen.”

A K–12 International Baccalaureate World School, Mulgrave enrolls about 1,000 students. The school uses Blackbaud’s Enrollment Management System, Student Information System, Financial Edge NXT®, Online Express, and Raiser’s Edge NXT.

Records on donors and donor patterns were important at Hopkins, too, where Reichart previously had been Director of Annual Giving for 12 years. In the past, she said, before going to offices of major donors, she used to print out all the information on each donor. “Now the information is just in the palm of my hand, instead of a sheaf of papers,” she said.



Alumni activities are within the advancement department at Hopkins. “We’ve used Online Express for four or five years, for alumni newsletters, invitations and other communications,” Reichart said. “We like having the stats and analytics right there.”

Even though Hopkins has been using Raiser’s Edge NXT for a long time, Junkins says they still see things they want to do with the system. They like the continual improvements, too. “Raiser’s Edge NXT now can filter by class year,” Reichart noted. “In the last few months, they have added some things that were important for us to have.”

Hopkins, the third oldest independent school in the country, is a co-ed college-preparatory day school with 715 students in grades 7-12. They have hosted their website with Blackbaud since 2005 and have used other pre-cloud Blackbaud products. In 2017-18 they implemented Blackbaud’s Student Information System and other Blackbaud products, moving to Blackbaud’s Total School Solution.

Better use of volunteers in fundraising was a goal of **Campbell Hall**, a K-12 independent day school serving 1,100 students in Studio City, California. The school brought on Blackbaud Volunteer Network Fundraising™ to support their volunteer program, with 65 volunteers on the Annual Fund Committee. In 2019-20, they raised \$3.3 million, and in 2020-21, during the pandemic, reached \$4.1 million with Volunteer Network Fundraising, reports Annual Giving Manager Marcia Campbell and Associate Annual Giving Manager Sarah Mulkeen. Messages from parents who are leaders in their own careers were effective, and the software made it easy for them to use, while increasing accountability.



Independent School alumni and donors receive marketing messages from many other nonprofits and charities. Most Independent School alumni go on to universities, and more than 90 percent of these institutions will send requests for support within a year of graduation. Alumni annual giving participation for universities has declined for the past 20 years, yet Independent Schools have had a slight increase in alumni donors in the same period. But annual participation for many Independent Schools remains below 20 percent, according to research from National Association of Independent Schools (NAIS). They report that more than 80 percent of donors who make planned gifts also give annually.

One aphorism in the Advancement world is: People give to people. Another is: Fundraisers tell the story of their school today – and what it could be tomorrow – and help people find their place in that story.

Potential major-gift donors must be strategically cultivated. The Prospect Insights tool for Raiser's Edge NXT has tools to leverage third-party data and advanced analytics to help the fundraiser identify people in the school's base of supporters who have significant capacity to donate. These automated insights into the school's supporter base can help the fundraiser to manage top prospects, while suggesting ask amounts and identifying donors at risk of lapsing.

In recent years, an estimated three-quarters of Independent Schools have started a “giving day,” reports NAIS. Blackbaud was among the founding organizations of “GivingTuesday” in 2012, and continues to offer free templates and tools for GivingTuesday activities. GivingTuesday campaigns are centered around building mass participation from donors in a short time, quickly raising funds while building community around a school. A major gift donation that is leveraged as a challenge or matching gift opportunity for donors during a “GivingDay” will stimulate competition and a desire to give for others.

Schools report that new and lapsed donors are energized by being part of a mini-campaign. If, a few months later, a school approaches those who gave earlier for a general fund campaign, many will contribute again.

Email is used by 98 percent of fundraisers to reach out to donors, yet only 3 percent use the potential donor’s recent interest or activity to personalize their emails, reports NAIS. Few send different messages to groups with identified special interests, such as former athletes or members of the debate team. Schools can track what donors are reading, what they are clicking on, and where they are spending time in the school’s online presence, as well as who’s attended recent events.

Saint Peter’s Prep, a Jesuit male college preparatory school in Jersey City, NJ, does personalize messages in detail. They house the school’s data in Raiser’s Edge NXT. With the school’s fundraising and relationship management solution integrated with its online marketing solution, the team can easily personalize messages.

Using Blackbaud Luminate Online® to power its digital marketing efforts, Saint Peter’s Prep Founders’ Day Challenge was a success. More

While many feared the pandemic would diminish donations, the strong stock market and collective spirit of generosity made 2020 the “highest year of charitable giving on record,” according to Giving USA’s 2021 year-end report. Giving to education was up 9% (7.7% adjusted for inflation). NAIS Data and Analysis for School Leadership (DASL) data showed that the 1,233 NAIS member schools had a near record year in 2020, with median giving per student averaging \$4,220 (annual and capital combined) .

The Blackbaud Institute reports that overall charitable giving increased 8.5% for all charities and 8.8% in K–12 schools in the 12 months ending in June 2022, compared to the previous 12 months. During that time, the average donation amount to K–12 institutions was \$1,494, and the average online donation was \$1,640. K–12 institutions received 6.4% of their total fundraising from online giving, according to the 2021 Blackbaud Charitable Giving Report.



than 400 alumni, parents, and friends donated more than \$275,000 for the Annual Fund. Saint Peter's reached out through direct mail, email marketing, and texting. This allowed the advancement team to engage a broad level of donors and build relationships with those who had not been contacted yet, reported Loual Puliafito, Saint Peter's Prep chief advancement officer.

Schools that have both Raiser's Edge NXT and Financial Edge NXT have a streamlined process for receiving donations online. Donation forms flow automatically into fundraising software and then into fund accounting software. Dashboards can be set up to easily monitor and measure each campaign. People who need access can have permission to view (but not inadvertently change) them. If the school is providing a thank-you gift for some donations, the accounting software can be set up to split the gift. In this way, the amount that is tax-deductible can be quickly accounted for both for donors and in the school's records. As the proportion of online donations has been increasing in recent years, this ability becomes even more important for schools to provide.

Gathering support from sources beyond tuition is crucial for the success of Independent Schools. Finding efficient and effective tools to help the Advancement staff meet and exceed their goals will help the school find resources to support both capital and annual needs.





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I think fundraising tends to feel very scary, but it's not really asking for money. It's connecting with people and making people feel like their impact does make a difference regardless of the giving level.

**Sarah Mulkeen, Associate Annual Giving Manager of
Campbell Hall School, Studio City, CA**

Tips

- 1** Make sure staff have ownership of information in the system.
.....
- 2** If you separate family records into individual records – so each family member is tracked on his or her own – each record will have a unique email address as well as showing unique interests. While this may initially take some time, it will prove incredibly helpful.
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- 3** Have a database manager.
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- 4** Customize your emails to take advantage of the specific interests of alumni and donors.
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- 5** Survey donors and prospects to learn more about their interests.
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- 6** Look at how donors overlap with past capital campaigns and the annual fund.
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- 7** Track what alumni and other donors are reading on your website.
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- 8** Consider a “GivingTuesday” event to involve new or lapsed donors and younger alumni.
.....
- 9** Recognizing that December is the most popular month for giving, plan ahead—especially if you don’t have a “GivingTuesday” right after Thanksgiving.
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- 10** Watch for signs of burnout in Advancement staff and support their efforts.
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About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, higher education institutions, K-12 schools, healthcare organizations, faith communities, arts and cultural organizations, foundations, companies, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, data intelligence, and expertise. Learn more at www.blackbaud.com.



The Art Of Running A Tech-Savvy School





A decade ago, Heads of Schools were concerned with how many computers to buy. Today they have more important things to focus on, asserts Principal Chuck Stembler at **Calvert Hall College High School** in Baltimore. Highly important to him: hiring the right people, securing data protection, and guarding against Denial of Service (DoS) attacks that would shut down the school's network.

Good IT people are worth their weight in gold, contends Principal Stembler. "In the past decade, it's become clear that we need to surround ourselves with great tech people," he said. "If I'm not at school for a week, no problem. But if the tech people are gone a week....oh my!"

"When you interview tech people, you want to focus on their demeanor and emotion," he asserted. "Often, tech people have to solve problems for faculty. Teachers don't want to look incapable when some technology doesn't work. So tech people need to work with them and calm the situation."

What are ideal qualities in an IT person? Stembler says he thinks about staff at a Best Buy or Apple Store: When angry customers come in, how are they treated, how are they calmed down? Those are the soft skills that Stembler is looking for. An IT staffer who says, “I can’t believe you didn’t know that” will make a teacher even angrier. Stembler said he wants someone who can deal with the relational part as well as the technical part of a problem.

School leaders know that getting the right fit for faculty is essential, too. Stembler said, “When you are interviewing new teachers, you want to ask them about how they integrate technology in the classroom and ask what they have used.” Ask: What is your philosophy of technology? Someone who says, “I’m terrified and I don’t want to use it” is not someone he wants in his school, which enrolls about 1,200 male students in grades 9-12.

While the Head may not understand all the details of how a new technology system will work, it’s essential that he or she communicates support for this change to all parties. “Chuck, as a leader, oversaw the process of converting to all Blackbaud products,” said Austin Ewachiw, Director of Technology. “We needed to find the tools to ease the burdens of updating six different systems that didn’t talk to each other.” Ewachiw said it took about six years to make the full transition from using some Blackbaud products to a full implementation of Blackbaud’s Total School Solution: Blackbaud Enrollment Management System™, Blackbaud Learning Management System™, Blackbaud School Website System™, Blackbaud Student Information System™, Blackbaud Financial Edge NXT®, and Blackbaud Raiser’s Edge NXT® with Target Analytics®.

“We were all in,” said Ewachiw, “and my part as the tech person was not in the little pieces but seeing how one thing rolls into another.” He said that having tools that integrate was also essential. “It turns out that it’s an ecosystem of tools that really only succeeds when they talk to each other.” The big leap of faith was that the new systems were going to touch all departments on campus, everyone globally in the school.

One reason for a new system that many people will understand: the efficiencies that can be created. “When students submit an application and are accepted, we have to enter the information just one time,” said principal Stembler.

It’s important that teachers and staff know the end goal of changing to a new tech system. “We did it in a slow, methodical way,” Stembler said. “People are skeptical about change, and sometimes it seems we move at a glacial pace.” At the same time, parent expectations are higher than ever. Stembler said that some parents will ask why the school can’t do something with technology the same way that a university is doing it. “We have to manage parent expectations, too.”

To get faculty to adapt to the new system, he said, “We ask them to emulate what we want from students. Are there bumps in the road? Yes!” he said. “With students we are creating the notion of



being a life-long learner, not doing the same thing every day. If you tried something and it didn't work, we'll try something else tomorrow—just as we want our students to do in their lives.” Most faculty readily adapted to the new system, he said, but some teachers just wanted to close their doors and do their own thing, while business staff tended to be more collaborative.

Once faculty and staff become comfortable with powerful technology systems, they can take on tasks not anticipated. Days before spring break in 2020, **River Oaks Baptist School** in Houston decided to transition its K-8 school to online in the midst of COVID-19. The school turned within days to its existing technology infrastructure powered by Blackbaud's Total School Solution to move all of its students to online asynchronous learning (learning that does not happen at the same time as a group).

“As we were preparing for the transition to distance learning, we relied on the recommendation of our technology team to use our Blackbaud solutions to institute an asynchronous-only classroom experience,” said Leanne Reynolds, Head of School. “It's the best decision we've ever made. Not only does it give our families the flexibility needed during these challenging times, but it's also simplifying the transition, which is so key. Many of our teachers, parents and students are already familiar with the Blackbaud solutions, so we're not experiencing the technology frustrations that so many others are, during this time. In fact, we're seeing more opportunities to use this technology in the classroom, which will extend well beyond the pandemic.”



School leaders want more and more immediate data today. “Our Superintendent has become reliant on access to a live dashboard to get the data he wants,” reports Sheila Wyer, IT Support, at **Southside Christian School** in Simpsonville, SC. The school’s Executive Director of Finance, Dan Yacoviello, believes he could make more informed decisions and have more insight into the business with the Microsoft Power BI platform, a suite of business analytics tools that pulls different areas of data and consolidates them into reports. Wyer built a dashboard using Target Analytics with the school’s Executive Director of Enrollment Management, Susan Dunlap, to provide current application and enrollment information.

Their school leader is not unique in wanting immediate data and relationships between various data sources. “I can see academics, discipline and attendance all at one time,” explained Calvert Hall Principal Stembler.

When a Head is trying to document issues with a particular student, patterns in data can be illuminating. Some broader questions to ask might include: Which students have been referred the most often? Which teachers refer the most students? What time of day or day of the week do the majority of discipline referrals occur? With information like this, a Head can take action or dig deeper with more questions.

Ten years ago, Heads didn't discuss topics like cybersecurity or cybersecurity insurance, but these are a huge part of the conversation today, Principal Stembler said. A leader needs to have good tech people on staff, as they are vital to the operation of the school. "When my tech guy tells me we need an incident response plan, I listen," he said.

Blackbaud products provide significant peace of mind for Heads – and leaders of technology departments, too. While a school may have a policy about keys to classrooms, labs, storage areas, and offices, setting data policies may be a new concept for Heads. Consider how the Director of Athletics has access to lacrosse equipment while the chemistry teacher has access to chemicals. Using technology permissions, Blackbaud systems can use the "role" of an individual to allow for viewing or changing data.

Blackbaud offers industry-standard protection for all the school's data. Storing data in the cloud, not on a school server, Blackbaud offers a security team dedicated to constant monitoring of current cybersecurity issues and threats. Cloud storage means cost savings, higher security for data, and an easier opportunity to restore operations and access school records if there's a flood, fire, hurricane, or other disaster. Blackbaud ensures the latest security protocols available in the industry for its products, with constant updates and detailed information about security in white papers and explanations.

The weakest link in a school's security is most often a careless individual. Heads should always be asking themselves: How "cyber-aware" are my faculty and staff? All employees need to know their role in protecting the school's resources, including digital ones. Sharing a password may seem harmless to the user but can undermine

No matter where you are in addressing your campus security, always start with the low-hanging fruit. You need good conversations, good peers, to find out what it is. Go to a seminar and learn that you could do this "one thing." Sometimes you will find it's not a big-ticket item. You'll never get to address your security needs without starting with the low-hanging fruit.

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— **Austin Ewachiw,**
Director of Technology,
Calvert Hall College HS,
Baltimore, MD

the security of student or family information. Clicking on a malicious link from an unknown sender can bring computer viruses into the system. Yearly training on cybersecurity has become a minimum requirement in most businesses, and schools should be no different.

Blackbaud recommends an ongoing cybersecurity communications program for staff. Build awareness by starting with a few core topics and communicate their impact at an emotional level. Emphasize that home users encounter these topics as well. Focus on a few topics and why people benefit from them. These topics might include: password security, patching/updating software, phishing, and accidental data loss or exposure. Everyone needs to be suspicious of emails that request filling in a form with personal information such as bank accounts or Social Security numbers.

Hiring the right staff – both faculty and tech support – has always been an important part of a Head's responsibilities. Bringing a new, robust technology platform into the school such as those offered by Blackbaud provides solutions for new concerns, such as cybersecurity and data privacy. These powerful tech tools also offer Heads and their staff some exciting new opportunities, including robust data analytics and efficiencies.





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The more you
learn about
cybersecurity: it's
WHEN you are
attacked (not if).

**Chuck Stembler, Principal, Calvert Hall College HS,
Baltimore, MD**

Tips

- 1 IT people are worth their weight in gold. They help the school run!
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- 2 Integrate IT people in discussions faster and sooner. If you are going to renovate a space, get them involved at the start. Don't focus on furniture first and ask your IT team later.
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- 3 When you're hiring faculty, ask about their use of technology.
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- 4 When you're hiring IT staff, try to see whether they have the relational skills to defuse a charged situation with a faculty or staff member.
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- 5 Ask your IT people to develop ongoing training in cybersecurity best practices, such as sharing passwords or phishing. Give them some time in faculty meetings or other settings to help all your staff learn how to protect your school's data.
.....
- 6 What are you doing now? What can you do better? Do an assessment and look at the top 10 or 20 issues. Use modern business scenarios in your cyber planning.
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About Blackbaud

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The Art of Finances and Financial Aid





Schools that used paper-based systems hoped that moving to electronic systems would increase efficiency in the financial office. The idea that information would be entered once and used both for financial systems and for financial aid – and where they intersected – was appealing, but not easy to achieve in a school using multiple different systems.

“Trying to manage tuition had been a nightmare for us because we were using a couple of products that weren’t integrated,” said Technology Director **Jeff Gaier, Archbishop Moeller High School**. “The shift to Blackbaud solutions for enrollment and tuition management and our new use of contracts made a huge difference for the admissions and financial offices and has allowed us to better manage and track tuition dollars.”

For **Joyce Longwell**, staff accountant at Moeller, adding Blackbaud Enrollment Management™ and Blackbaud Tuition Management™ has been a gamechanger that allows her to set up tuition accounts for the next school year by April rather than in August. “My time touching those accounts went from maybe 5 minutes to 2 to 3 seconds, so my time really freed up,” she said.

“I’ve picked up a lot of other general ledger work and accounting work because of it.” Archbishop Moeller High School is an all-male, college-preparatory high school in the suburbs of Cincinnati, Ohio.

With Blackbaud Tuition Management™ already in place, **The Dunham School** moved to a fully integrated contract management process several years ago. They implemented and connected Blackbaud Enrollment Management System, Blackbaud Tuition Management, and the Blackbaud Financial Edge NXT fund accounting platform. The process is now integrated, significantly reducing time and errors.

“They tell you that you punch a button and it’s done, and that is the absolute truth,” reported **Grady Hazel**, Director of Finance and Operations at The Dunham School. “You punch a button, and it’s there.”

“We previously entered billing details manually,” she said. “We used to create spreadsheets with everybody’s tuition and everybody’s tuition discounts, then enter it manually into the tuition system.” The Dunham School is an independent, inter-denominational, Christian, college-preparatory, coeducational day school in unincorporated East Baton Rouge Parish, Louisiana. Founded in 1981, it serves 825 students from PK through grade 12.

In addition to reducing time, an integrated system can help schools reduce delinquent accounts, also saving staff time. After transitioning its tuition management to Blackbaud, **Gonzaga College High School** experienced an 11% increase in tuition revenue in just a few months. In the first year after implementation, they had a 50% reduction in delinquent tuition payments. Gonzaga College High School saved more than \$20,000 in printing and mailing costs, as well as two full days of staff time, after moving its summer mailing online. Student applications grew 13% after going live on the new website. Founded in 1821, Gonzaga is Washington, D.C.’s only Jesuit high school, enrolling 960 male students in grades 9-12.

A 50% decrease in delinquent tuition was the experience at Belen Jesuit School in Miami as well. Belen Jesuit had mailed coupon books to parents, and parents would then either mail back their tuition checks, one by one, or bring them to the school. With Blackbaud Tuition Management™, Belen Jesuit not only handles nearly all payments online but eliminated nearly all paper checks.

“It definitely helped with delinquency,” said IT Support Administrator **Bryan Lorenzo**. “Before, parents would have to go in and manually pay online,” Lorenzo added. “When we switched to automatic payments, it drafts to a bank account or charges to a credit card automatically.” Belen Jesuit, reestablished in Miami in 1961 after more than 100 years of operation in Havana, Cuba, enrolls 1,373 male students in grades 6-12.

Coming from the corporate world and accustomed to using powerful financial tools there, **Dan Yacoviello** was pleased to find Blackbaud tools that powered the finance office and financial aid process at the school he joined. Yacoviello is Executive Director of Finance at **Southside Christian School**, southeast of Greenville, SC, which enrolls about 1,250 students in PK2-grade 12.



“The numbers are always right, debits and credits coming over from tuition management,” he said. “That’s a huge plus in my mind. I have confidence that billing comes over directly to the General Ledger.”

Previously using the tools of the corporate world, with massive ERP systems and links with Excel, he says Blackbaud is comparable. “I’m in Excel all the time,” he said. “I do a data dump of GL accounts by month and account and manipulate the data.” He likes having a status report at any given moment and finds it helpful for long-term planning as well. “I’m a financial planner with long-term modeling in my background.”

He wants to get to PowerBI for graphical reporting. He said the tuition assistance committee meetings can easily see all data from last year and this year and some of the metrics of tuition assistance. “We want to move in that direction for internal financial reporting,” he added.

Southside’s Accounting Assistant **Jackie Blanton**, who has handled accounts receivable, billing and tuition at the school for six years, can compare life before and after the full integration with Blackbaud. “Before it was painful,” she said. She cited the benefit on the billing side, for example, the contracts. “I bill with a lot of discounts and tiers,” she explained. “Because we tier our discounts, these are put in manually before the contract is sent to the parent. Then the contract – with all applicable discounts – is automatically populated into Blackbaud Tuition Management once the parents sign.”



It was designed with **Sheila Wyer**, the school's IT Support Specialist, to work with their specific billing policies.

A big challenge of the switch to a fully integrated Blackbaud systems was that it started in March 2020, just as Southside shut down during the pandemic. Wyer worked in the school office, while everyone else worked remotely. Even with that challenge, Blanton started getting payments through the new system in June.

Parents appreciate when she gives them a quick overview of tuition management and the itemized bill. She said, "Right now I can hit billing detail and export to a spreadsheet and send that to a parent. This shows discount, tuition assistance, etc., which parents can't see from their account."

Parents can use credit cards or ACH (bank withdrawal) to pay. "We absorbed the fees for a few years on credit card use, and it cost us \$40,000 a year. Now we make them pay the credit card fees. Now almost everyone uses ACH," Wyer said.

Wyer also said that Southside parents don't worry about putting money on the lunch system as everything is on one bill. "We compile charges monthly, then send them to tuition management to collect them. We do a lot of incidental billing, making it easy for parents to pay monthly," she said.

Blackbaud informs decisions on financial aid/ tuition assistance but it is not the only thing considered, said Yacoviello. “We go case by case,” he explained. “Blackbaud tells us what they can afford, but it’s not the only decision point. Amounts might change each year if a parent lost a job or life circumstances. We take it into account every year.”

Southside’s accountant, **Kelli Marquez**, says that FENXT has what she needs to do her job well. Accounts payable, accounts receivable, payroll, fixed assets and student billing all feed into FENXT, creating a powerful combination of tools for the finance office.

“Watching all the training videos isn’t required but they help to extend my knowledge,” she said.

“After using it for a year, it’s going great for what we are going to do,” said Yacoviello, the finance head. “We are learning, and moving to PowerBI will be a huge win for us. We are pleased with it. Some things will get better over time.”

Financial Edge NXT simplifies fund accounting and has pre-integrated services, secure data, and rapid, automatic updates. When integrated with Blackbaud Tuition Management™ and Blackbaud Financial Aid Management™, together these provide seamless, cloud-based tools for the finance and financial aid offices.



NAIS estimated, from a survey of their membership serving about 700,000 students, that about a quarter of students in day schools received financial aid, an average of \$11,500. They also estimated that nearly half of students at boarding schools received financial aid, averaging about \$25,000.

Tips

- 1** Encourage a new administrator in the business office to get to know the department heads around the school who are affected by the office's work. For the CFO, this is every department head who supervises a budget.
- 2** Encourage a new administrator in the business office to meet with the chairs of board committees between meetings. For the CFO: the Finance, Audit, Facilities, and Investment Committee chairs. These relationships are vital.
- 3** Start thinking of Microsoft BI as soon as you can -- there's great power there.
- 4** Release information incrementally in a timely manner to avoid overwhelming families with too much information at once. Recognize that onboarding means that parents are moving from interactions with admissions staff to other school staff.
- 5** On initial setup, consider setting up billing months with a two-month extension at the end of the year for additional collections.
- 6** Watching all the training videos isn't required, but they really help to extend the user's knowledge of the system's capabilities.
- 7** Look at what credit card fees are costing you. Can you add them as a fee or give preference to another form of payment that won't cost as much, such as ACH? One school found they were paying more than \$40,000 in credit card fees one year.
- 8** Create folders that group your reports by task. Some reports run monthly, others weekly.
- 9** Make the budget a strategic planning tool. See variance amounts and what percentage various accounts are over budget.



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Financial Edge NXT
is almost self-intuitive.
Blackbaud has done a
good job of simplifying
the software while still
addressing the intricacies of
the financial needs we have.

**Neal Pike, Chief Financial Officer,
The Heritage School, Newnan, GA**

About Blackbaud

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