

# Raiser's Edge Protocol

This protocol should be read in conjunction with the [Customer Relationship Management \(CRM\)](#) programme.



The University has relationships with a broad range of external organisational stakeholders and key individual stakeholders. Staff from different schools and divisions or equivalent often communicate with a particular stakeholder with no knowledge of the other relationships across the University. In order to strategically manage the University's communications with these stakeholders it is important we act in an integrated and coordinated manner.

Some of the dangers of not being coordinated in our interactions with stakeholders are:

1. Stakeholders feel they are interacting with a range of unrelated organisations and become frustrated because University staff are not aware of others interactions.
2. The University misses out on opportunities for funding or internships/work placements because the right people are not notified of these possibilities.
3. Key University staff do not have a full picture of the ways a stakeholder is interacting with the organisation and hence the breadth of their partnership is not recognised nor managed accordingly.
4. We are unable to be accurate in creating invitation lists for events and targeting activities to meet stakeholders' interests.

A key rationale for entering data into the Raiser's Edge database is to make visible the number and variety of contacts the University has with those key stakeholders. By encouraging staff to record their contacts and interactions in a system used across the University, there must be agreed protocols around access and use of the data.

This paper seeks to recommend a number of core protocols for using the Raiser's Edge database (or any central CRM system).

## RECOMMENDED PROTOCOLS

- All key relationships are allocated to a stakeholder group in the system and this grouping will indicate the appropriate person to be the Relationship Manager for that relationship.
- Relationship Managers ensure contact details and organisational contacts are regularly reviewed and updated in the system.
- Special relationships are called VIPs and organisations and individuals in this category have special attributes added to their records to indicate they are VIPs. VIP Relationship Managers will normally be the Vice-Chancellor, a member of the University Leadership Group or a member of the Development Office and on occasion the School or equivalent that has developed the relationship.

### VIP Organisations

Level 1 – always contact the VIP Relationship Manager before entering into communications with senior employees of these organisations.

### VIP Individuals

Level 1 – always contact the VIP Relationship Manager before entering into communications with the individual.

- It is essential that staff interacting with any external stakeholders always check the relevant record in the Raiser's Edge prior to any communication to ensure they understand who else in the University has a relationship with that stakeholder, and any particular issues of which they need to be aware.
- Any interactions or initiatives with stakeholders must be recorded in the database and contact details updated whenever a staff member becomes aware of a change.
- All events involving external stakeholders are added into the database.

- Staff wishing to invite external stakeholders to events should liaise with the University’s Event team. They should also source their initial invite lists from the database – stakeholder groupings can be used to generate these lists (the CRM Systems Manager can assist in providing exports).

**Note:** Any proposed fundraising activities on behalf of the University must be discussed with the Development Office in the first instance.

## ▼ ACCESS AND TRAINING

Staff of the University who have regular interaction with external partners or Alumni need desktop access to Raisers Edge. To be added to this network and obtain training in its use, contact CRM Systems Manager, Pam Bird [pamela.bird@waikato.ac.nz](mailto:pamela.bird@waikato.ac.nz).

## ▼ DATA MINING, CAMPAIGNS AND PROMOTIONS

Whilst basic training will allow all users to check records and update files, data-mining of the CRM system to create campaign databases can only be undertaken by the CRM Systems Manager (Pam Bird). This is partly due to the level of expertise required and extensive training that would be needed, and partly so that University wide coordination is maintained. If a targeted database is required, please make a request directly to the Director Development and Alumni including all filters required and a timeline.

Email marketing and correspondence are vital channels in our repertoire of engagement tools. They are also very widely used and can slip into the ‘spam’ area quickly if not practiced in a coordinated and disciplined fashion. Ensure filters are such that the recipient of any email from the University instantly recognises that this subject matter is relevant to them and ‘book’ your promotion in with Marketing so that it can be confirmed that the timing does not clash with other email campaigns.

## ▼ PRIVACY

Staff involved in the collection, update, use, storage, disclosure and sharing of personal information must adhere to the [Privacy Principles](#) contained in the [Privacy Act 2020](#). Responsibilities with respect to the collection and management of personal information by University staff in accordance with the Act are set out in the University’s [Personal Information and Privacy Policy](#) and [Privacy Statement](#). Breaches of the policy may result in disciplinary action under the [Staff Code of Conduct](#).

## ▼ CONTACTS

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