

CUSTOMER SPOTLIGHT

Preble Street



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Nicole Holt has long supported Preble Street’s efforts to serve Maine’s vulnerable residents through her work for the nonprofit’s development team, which relies on Blackbaud Raiser’s Edge NXT—the leading solution for fundraising and relationship management. Now, Holt extends Raiser’s Edge NXT’s configurable capabilities through connectors to Microsoft Power Automate, building automations that allow Preble Street to operate more effectively—a Blackbaud-supported power move that’s also shaping her career.

Preble Street automates critical processes to secure funding in more strategic ways

Preble Street responds to crises of homelessness, housing scarcity, hunger, and poverty in Maine through its shelters, street outreach, emergency food initiatives, health services, anti-human-trafficking services, and other partnerships and programs. “It’s a constantly adapting environment to make sure we are giving people what they need,” said Data Systems Project Manager Nicole Holt, who has been on staff at the Portland-based nonprofit for a dozen years.

Preble Street is powered by:
Blackbaud Raiser’s Edge NXT®
ResearchPoint™

When Preble Street delivers vital services, the results are transformative. “My life changed from being completely homeless, sleeping in a tent, and living in chaos from moment to moment to maintaining my recovery and having a steady place to stay,” one Portland resident recently shared of his experience with Preble Street’s Homeless Opioid User Service Engagement (HOUSE) program.

The nonprofit couldn’t provide these life-changing programs and services without the fundraising and grant funding that Holt supports, so she applies the same spirit of adaptation that drives the nonprofit’s frontline initiatives to her behind-the-scenes work. In recent years, she has drawn even more on the extensibility of Blackbaud Raiser’s Edge NXT by using its Certified Connectors to the Microsoft Power Platform to build automations that make workflows hyper-specific to Preble Street’s needs.

These workflows enable new possibilities, including processes that help Preble Street connect more personally with volunteers who have high capacity for giving. “Once we saw how powerful the tool was when used with Raiser’s Edge NXT, it was pretty eye-opening,” Holt said.



Game-changing Workflow Improvements

Holt started without a background in software development or coding when she began exploring how to use the Microsoft Power Platform, which includes the dynamic workflow automation capabilities of Microsoft Power Automate. But she has drawn on Blackbaud’s helpful community of support, which has enabled her to build skill and expertise.

Raiser’s Edge NXT users can easily access templates and tutorials through Blackbaud’s free Microsoft Power Platform resource library and the peer-driven Blackbaud Community, which features an engaged Microsoft Power Platform user group that Holt contributes to and also looks to for advice and inspiration.

Holt got started during the early months of the pandemic, when Preble Street’s development director encouraged her to join the Blackbaud’s Accelerator classes, which are now available on demand. Preble Street was in the thick of COVID response and had paused a capital campaign to steer giving to pressing needs. “We had such a surge in donor activity that we really were capping out our ability to effectively process things.”

To streamline, she introduced an automated daily large-gift reporting process adapted from free Blackbaud resources. The process alerts staff when major gifts arrive so they know to start next steps in stewardship. “It was a game-changer for us. Once we had that first workflow, with that really simple overnight gift digest email that goes out to the right people, we were able to see the value ... and expand on that.”



Up to
10

hours a week
saved with just two
automations for gift reporting
and documentation





She estimates that the gift digest can save staff up to an hour of work a day, or about five hours a week, and a recent automated workflow that links critical gift documentation stored in Microsoft's SharePoint to Raiser's Edge NXT records can save a similar number of hours. Staff, in turn, can direct that time to more strategic work. "When we take that administrative burden off staff, they are able to engage in more creative problem solving," Holt explained.

Committed to Supporting Each Other

In two and a half years, with the support of the Blackbaud Community and a growing set of Blackbaud resources, including Skills Labs posted on YouTube from the Blackbaud Developers' Conference, Holt has already introduced 20 or so automated business processes to Preble Street. And as her strategic role in process improvement has evolved, she has expanded her efforts to include departments beyond the development team.

Some of the automations create administrative efficiencies. Some promote data hygiene. And some allow Preble Street staff who do not have direct access to Raiser's Edge NXT to provide information that flows directly into the platform's records for the purposes of tracking mission-critical grant projects. Holt's colleagues welcome the improvements: Preble Street's grants team has credited her process automations with helping them achieve their funding goals.

EXTEND CAPABILITIES WITH THE SUPPORT YOU WANT

Blackbaud Raiser's Edge NXT provides a comprehensive set of CRM capabilities and is purpose built for further extensibility. Organizations that use Raiser's Edge NXT with Certified Connectors to the Microsoft Power Platform can easily adopt and design valuable automations that meet their special needs.

There are three categories for using Microsoft Power Platform with Blackbaud solutions:

Do it yourself (DIY)—You leverage the rich resources available in the Blackbaud Community, Microsoft learning paths, web search, YouTube, user groups, and your peers to pick up the skills needed to build automated workflows.

Supported—You partner with a Blackbaud expert, Blackbaud Partner, or independent consultant to build alongside you so you learn the skills.

Outsourced—You contract with a Blackbaud expert, official partner, or independent consultant on an ongoing basis or on a single project to build your application from end to end.

It was a grants project management workflow she created for Preble Street and shared with Blackbaud Community that earned her the Community Award at the Blackbaud Developers' Conference. For her contributions, she received an innovation grant award that allowed Preble Street to partner with a Blackbaud Power Platform expert on a complex automation that ties into VolunteerHub, a Blackbaud partner that supports volunteer management and coordination.

The integration of VolunteerHub with Blackbaud Raiser's Edge NXT and Blackbaud's ResearchPoint already allowed Preble Street to pinpoint volunteers who are or could be high-capacity donors. The added automation allows Preble Street staff to determine ahead of time when and where those volunteers will be on-site and use this advance knowledge to arrange additional cultivation efforts. The template is available free and open-sourced for anyone else who wishes to use it as a starting place for their own process improvement projects.

Holt pointed back to the Blackbaud Accelerator course, the library of resources, and the camaraderie of the Blackbaud Community, which connects representatives of many social good organizations, for making it all possible.

"There's so much democratization of information in the Blackbaud Community. There aren't gatekeepers. Everyone is just committed to helping folks out," she said. "I can't tell you how happy I am that I took the time to engage with the Blackbaud Community and with the learning. It gave me the space to think about things in a different way."

Innovate with Blackbaud Raiser's Edge NXT and the Microsoft Power Platform.

[Learn more](#)



20

automated processes

adopted by Preble Street within 2 ½ years through Blackbaud Raiser's Edge NXT and Certified Connectors to Microsoft Power Platform

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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.