



Strengthening Chicago's Nonprofit Community

# Program Concept and Proposal

## **Raiser's Edge Professional Development**

*Presented to the YNPN Chicago Executive Board for e-vote and approval 11/19/2017*

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<b>OVERVIEW</b>	<b>2</b>
Program Title	2
Program Summary	2
Target Audience	2
Program Deliverables	2
Projected Income/Expenses	2
Why are we doing this program?	2
<b>SUPPLEMENTARY MATERIALS</b>	<b>3</b>
Financial Review	3
Scope of Service	3
Facilitator Background and Biography	4
Survey Results	5



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## OVERVIEW

### Program Title

Crash Course Introduction to Raiser's Edge

### Program Summary

This program will provide beginners and job-seekers with a full-day overview of [Raiser's Edge](#), a widely-used fundraising software database. Content will be delivered in the form of a live webinar facilitated by [Felicia Terry](#), owner of [Nonprofit Software Specialists](#). To create a shared learning environment and encourage peer-to-peer networking, all participants will be seated in one room to view the presentation.

**Time:** 9:00 AM-4:00 PM (includes breaks and lunch break)

**Date:** Saturday, January 2018

**Location:** Forefront (will confirm after date choice)

**Ticket:** \$30 (early bird), \$35 regular

**Capacity:** 30

### Target Audience

People with little to no Raiser's Edge experience, including job-seekers. People who need a refresher course or lack training from their employer.

### Program Deliverables

Participants will receive materials to use in the workplace, including printed Raiser's Edge training handouts and an electronic copy of the recorded training. Participants also receive a certificate of completion.

### Projected Income/Expenses

INCOME		
Program Income	\$900	\$30 x 30 tickets sold
Total Income	\$900	
EXPENSES		
Facilitator Fees	\$2,100	\$1750-Facilitator fee (includes webinar platform, curriculum design, recording of webinar) \$350-Print handouts and completion certificates for participants (assembled by contractor)
Food & Beverages	\$100	Snacks for participants
Total Expenses	\$2,200	
Net Income	-\$1300 <sup>1</sup>	

### Why are we doing this program?

*How does this program align with YNPN Chicago's mission and vision?*

YNPN Chicago members have reported feeling that their resumes are being passed over without Raiser's Edge Training. Guided training sessions from Blackbaud are rare, and when it is accessible, it is typically extremely costly (over \$400 a day). By allowing members to purchase tickets for \$30, we are opening access to a much in demand tool which can help people move up in their jobs.

The format of this program allows for members to mingle with each other and network during the day. The peer-to-peer learning will help promote an environment of professional growth.

<sup>1</sup> In the YNPN Chicago [2017 budget](#), \$1500 was budgeted for speaker fees, \$900 projected for program income. A resulting \$600 loss was planned for this program.

## SUPPLEMENTARY MATERIALS

### Financial Review<sup>2</sup>

#### Why We Can Afford It

Even though this is an unforeseen expense, we have the financial ability to take on the expense based on a few facts:

- Celebration performed around \$2,000<sup>3</sup> better than expected this year due to lower than projected expenses.
- Our other budget items (programming, LI, etc) are all on pace to come in near projections
- We have \$20-\$25K in savings with no immediate plans to use

#### Other Considerations

- We originally budgeted for a \$600 loss on potential RE training, and these new projections assume a loss of between \$1,300 and \$1,600 (\$700-\$1,000 more than expected)
- No individual program losses this much money, so are we comfortable justifying to a loss of this size for a new program?
- Is this the best use of funds? The \$700 - \$1000 incremental loss represents money that could be used on other focus areas (food at events, multiple additional programs, etc). Is this event more of a priority than other uses of those funds?

#### Bottom Line

From a strictly financial standpoint, we can afford it. From a fiduciary responsibility standpoint, we should consider whether this is the best way to use our funds to advance our mission. If we are comfortable that this program is aligned to our mission and provides significant value to justify the cost, then we can definitely go for it.

### Scope of Service<sup>4</sup>

#### Project Scope

Felicia G. Terry, Principal Specialist, will work closely with Young Nonprofit Professionals Network (YNPN) to provide:

WHAT: Raiser's Edge workshop

WHEN: Delivered online via Zoom Video conferencing

*Note: The number of participants not to exceed 30.*

WHERE: Saturday, November 4, 2017 (9am – 4pm)

*Note: Includes 5-10-minute breaks every hour and break for lunch (45-minutes to 1-hour)*

Topic covered:

1. Information about Blackbaud
2. RE Basics
  - a. User Options
  - b. Record Screens
3. Entering information into:
  - a. Constituent screens
    - i. Bio 1 tab
    - ii. Bio 2 tab
    - iii. Addresses

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<sup>2</sup> Information from 9/12/2017 email from Ryan Charnov, Finance Co-Chair to Executive Co-Chairs

<sup>3</sup> These funds will be applied toward 2017 Leadership Institute expenses.

<sup>4</sup> Information from page five of the Services Agreement from NPSS Pro

- iv. Addressee/Salutations
- v. Relationships
- vi. Notes
- vii. Attributes
- viii. Media
- ix. Actions
4. Viewing Gift record screens
5. Query
  - a. Understanding Query & Query Basics
  - b. How to Create, Run and Save Queries
  - c. Query Lists
  - d. Query Tips
6. Reports
  - a. Understanding the various Reports & Report Basics
  - b. How to Create, Run and Save Reports
  - c. Report tips
  - d. When to use a query vs. when to use a Report
7. How to add your RE experience/certificate to your resume
8. How to interview for a position that requires RE experience

*If time permits...*

9. Exporting data from RE
  - a. Why you should use Export instead of Query to export most data
  - b. Understanding Export
  - c. How to Create, Run and Save Exports

### **Project Deliverables**

- Participant Handouts
- Certificate of completion for each participant
- Participant access to copy of Zoom recording

## **Facilitator Background and Biography**

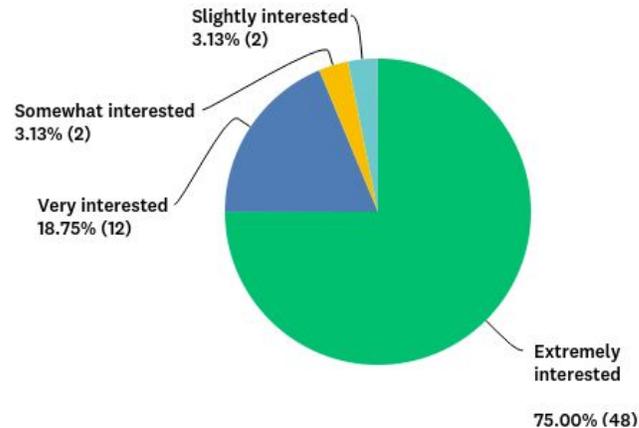
### **Felicia Terry, CNC**

[Felicia Terry](#) has 18 years of experience training Raiser's Edge. She provides training for a number of other nonprofit software programs. She is based in Nashville, TN, where she is the founder and principal specialist for [Nonprofit Software Specialists](#), LLC. Felicia trains nonprofit professionals all over the country including a diverse range of nonprofit individuals (e.g. front-line staff, Executive Directors, etc.) with various Raiser's Edge levels (e.g. no experience, basic users, intermediate users, advanced users). She offers training programs at an organization's location or remotely. Felicia and NPSS are not affiliated with Blackbaud; however, the proposed training and syllabus is modeled after Blackbaud's "Fundamental Course".

Felicia is a lover of databases & a self-proclaimed database geek. Her favorite quote is "I love it when a plan comes together" from Hannibal of the A-Team. With 20 years experience serving in fundraising and database management roles, Felicia loves to develop plans for nonprofits to use their CRMs/donor management software more effectively. She is known for her creative energy and support of organizations large and small. Her clients value her experience in the nonprofit development world, relish her passion, and enjoy the sense of humor she brings to each project. Felicia has been a Certified Nonprofit Consultant (CNC) since 2011.

## Survey Results<sup>5</sup>

Q1 Based on the description above, how interested would you be in attending an onsite introductory course to Raiser's Edge?



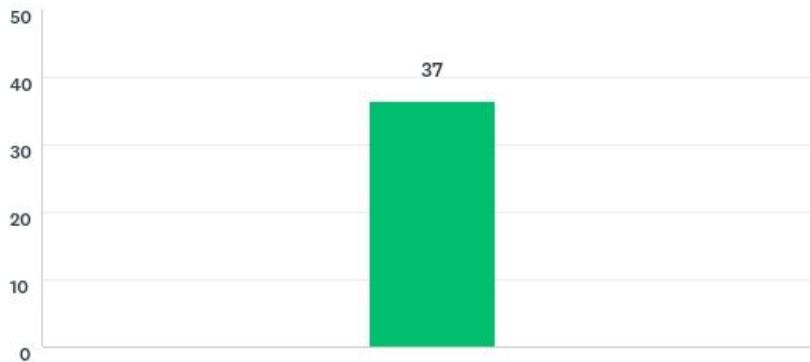
Q2 How much time would you be willing to spend to attend this course?



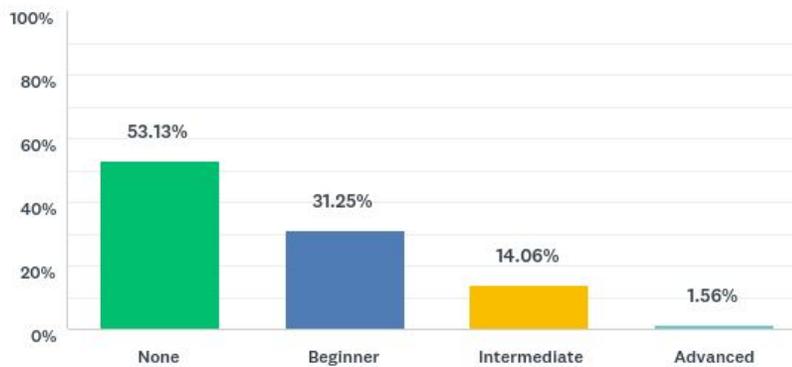
#	COMMENTS:	DATE
1	A Mon-Fri option would be preferred	2/21/2017 11:08 AM
2	I think it would be good to cover queries, lists, merging and linking - that takes time.	2/14/2017 12:27 PM
3	I'm seeking to transition in jobs from programming to development and I'm happy to invest whatever time it takes to make sure that I'm a viable candidate.	2/14/2017 12:03 PM
4	Possibly more if it couldn't be covered in a short amount of time	2/14/2017 11:19 AM

<sup>5</sup> Results from "Raiser's Edge Course Interest Survey," February 2017. 64 responses.

### Q3 About how much would you be willing to spend on this course?



### Q4 Which best describes your level of proficiency with Raiser's Edge?



#	COMMENTS:	DATE
1	I usually use Blackbaud Convio, I think there is some overlap	2/21/2017 3:01 PM
2	I struggle with queries, pulling reports, and using the mail features.	2/14/2017 4:16 PM
3	Poke around a lot, but definitely would love some guidance	2/14/2017 2:43 PM
4	Beginner to intermediate. I freelance a lot so I use whatever the organization has set up. Each org is different, so that's challenging.	2/14/2017 12:27 PM
5	We use a different database company at my current job, but I would appreciate the experience for future job searches.	2/14/2017 11:29 AM



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## Q5 Please share any additional comments or questions here:

Answered: 10 Skipped: 54

#	RESPONSES	DATE
1	I would also be interested in other fundraising platform trainings! We use Salesforce at my org so that would certainly be of interest.	3/4/2017 11:16 AM
2	I think this is great! I think at some point offering Salesforce would be great too. Both are often requirements for positions.	2/15/2017 1:08 PM
3	Sundays would work better!	2/14/2017 2:43 PM
4	Thanks for doing this.	2/14/2017 2:02 PM
5	I would be also interested in an introductory class on using Constant Contact and or other forms of email communications. Thank you!	2/14/2017 1:07 PM
6	FANTASTIC idea. This is such a huge (and unnecessary) barrier for everyone, whether you are starting out, freelance or are a seasoned professional.	2/14/2017 12:27 PM
7	This is a great idea. I am a job seeker and I see a lot of jobs that I qualify for that require experience with this program. I consider myself to be a fast learner so I think this program could be geared towards people who have no experience as well as those who have some and want a refresher	2/14/2017 11:34 AM
8	I'm willing to spend \$50 on the course - the slide scale above has 2 different amounts. The text box says \$50, but the top range is labeled \$100.	2/14/2017 11:29 AM
9	Along this same vein, Tessitura training would be equally helpful. Thank you for considering this, this truly was a huge roadblock when applying for jobs. Sidenote: I tried to say \$25 for #3 but the box on the left and the numbers on the bar didn't match.	2/14/2017 11:05 AM
10	N/A	2/14/2017 11:04 AM