

## Consulting Services for

# RAISER'S® EDGE

## Database System Assessment & Tune-Up

- Provide a fresh, objective evaluation of your systems. Assess segmentation (code and attribute analysis) and data cleaning, including analysis of your appeals, funds and campaigns
- Ensure that your data is organised with a pragmatic approach, which is both logical and intuitive
- Review and update your regular reporting system

## Business Processes Assessment

- Evaluate current processes according to best practise, audit requirements, and administrative efficiency
- Evaluate current workflow and expectations
- Document business processes for your CFO, auditors, and ensure appropriate institutional memory
- Review user security privileges

## Raiser's Edge® Implementation

Accommodate and facilitate organisational dynamics:

- Seamless data conversion with a negligible disruption to your donor services
- Organise data in a sensible and strategic way, easily understandable by your fundraising administration team
- Staff training tailored to staff responsibilities and the needs of your organisation
- Establish good reporting protocols
- Establish appropriate workflow processes and expectations

## Tailored Training

On-site staff training designed to increase staff confidence, efficiency and have a lasting impact on your organization long after training is completed.

## Interface with IT Departments

Ensure your IT department knows, understands, and assists you in realising the full potential of Raiser's Edge®. This includes managing staff during the initial software installation, and establishing maintenance and internal backup procedures.

## Background Qualifications

With over 25 years experience in Fundraising and Resource Development Joan brings a depth of understanding and Project Management expertise that will ensure your donors are the primary focus of your donor programme.

Joan has managed data migration and implementation for over 7 organisations including CWS New Zealand, St John Ambulance, Arthritis NZ, Hamilton Boy High School, and First United (Vancouver). Joan has worked with a wide variety of organisations from small to very large non-profits and continues to provide on-going support services. Her key strength is she always keeps fundraising the priority over IT or administrative functions ensuring you maximise your results.

With the right tools, building donors is simple as child's play

A database review will help you optimise your donor services, gain time efficiencies, improve the quality of your data and maximise funding opportunities.



Having a focused and experienced project manager who understands the fundraising and non-profit environment will make the process manageable and deliver measurable

# Joan Buchanan

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