

## HandsOn Teams with Capital Business Solutions to Deliver Raiser’s Edge Training



HandsOn  
NORTHWEST NORTH CAROLINA

Raiser’s Edge has long been the standard in the best of fundraising software and donor database management. Its feature set is wide and deep – it could be called a development director’s dream – that is, if you know how to use it.

The Problem	The Solution	The Benefits
<p>Finding a cost effective way to provide training to those among HandsOn’s network of 500 nonprofit organizations using Raiser’s Edge</p>	<p>HandsOn partnered with Capital Business Solutions to provide two days of training. Day one of the training was a Raiser’s Edge overview/refresher course. Day two will address mailing donor acknowledgements, customizing reports, exports, queries and other functions.</p>	<p>Attendees found the training extremely valuable, giving the trainer a 4.9 (out of a possible 5.0) rating. Attendees identified several immediate steps and actions that they can take as a result of the training and expressed a desire for more training.</p>

But what happens when the power user retires or moves to another organization? If there isn’t someone who is properly trained, the software solution is no longer being used at an optimal level.

### Ongoing Need and Demand for Software Training

HandsOn Executive Director Amy Lytle and Program Director Kathy Davis convene a peer philanthropy group comprised of fundraisers and nonprofits that meet three times a year. At the summer meeting they floated the idea of offering Raiser’s Edge training at HandsOn for any organization that wanted to participate.

### Obstacles to Training

Amy Lytle and Kathy Davis had touched on a pent up desire. Their proposed group training was enthusiastically encouraged because many of the nonprofits realized they lacked proper training on the software for a variety of reasons: an individual who had been trained had left the

organization; personnel tasked with using the software could not travel to receive proper training; and more common, the organization could not afford the cost of the publisher's training options.

## HandsOn Enlists Capital Business Solutions to Provide Training

By offering group training for local nonprofits at their HandOn offices, Lytle and Davis had overcome the typical obstacles to obtaining needed training. "Our rate was significantly less than the thousands the organization would have to spend normally," noted Amy Lytle.

"Capital Business Solutions (CBS) was recommended by the Winston-Salem Foundation, which has worked with CBS before and helped underwrite part of the cost of the training," said Kathy Davis. "We hired CBS to conduct the training and by opening the training to local nonprofits, we were able to offer them economies of scale that would allow them to participate."

## An Excellent Experience for Attending Nonprofits

HandsOn surveyed the attendees to gauge the effectiveness of the training. CBS Fundraising Practice Manager Alyson Watts who led the training received a 4.9 out of a possible 5.0 rating.

"We also want to get an idea of whether training is immediately beneficial," said Kathy Davis. "It's an open-ended question that asks, Are there any immediate steps/actions you will take as a result of this training? If so, what are they? On average, other trainings we've offered have 50 -70 percent of attendees

saying there will be an immediate benefit of putting into practice something they've learned. In this case 83% of the attendees were able to name a benefit, which is very, very good."

The nonprofits in attendance reported the following areas (and more) that they now felt better equipped to address:

- Using Raiser's Edge to help with our Annual Report
- Setting parameters for our 2017 campaign
- Running "giving history" reports
- Re-work some of the inside features that I didn't know existed

In addition to learning about features and functionality, attendees were excited to meet other Raiser's Edge users and saw the value of having a local network of people who can help one another.

**"It was a great overview and you could start working in Raiser's Edge after this class."**

## Next Steps

HandsOn will have Alyson Watts of CBS back for a second day of Raiser's Edge training.

Both CBS and HandsOn believe that with the appropriate training, nonprofits can better use the software they've invested in to control costs, operate more efficiently, and deploy better campaigns – all of which greatly contributes to mission fulfillment and better service to their constituents and communities.