

PROPOSAL
for
ANALYSIS, DESIGN,
IMPLEMENTATION,
TRAINING and MAINTENANCE
of
BLACKBAUD RAZOR'S EDGE
FUND ACCOUNTING PROGRAM

PREPARED FOR THE EXCLUSIVE USE OF THE

SACRAMENTO
PUBLIC LIBRARY
FOUNDATION

Proposal for Analysis, Design, Implementation, Training and Maintenance of Blackbaud Razor's Edge Fund Accounting Program

The Sacramento Public Library Foundation purchased the software program for The Razor's Edge approximately two years ago. It has been installed on the Foundation server, data conversion from FundMaster Lite (FM Lite) has been completed on four separate occasions, and the Foundation has an ongoing maintenance agreement with Blackbaud for customer support of this program. The following proposal covers the effective transition, training, use, and maintenance of the Razor's Edge as it applies to the Sacramento Public Library Foundation.

Completion of Training Modules

Razor's Edge is a powerful fund accounting program implementing data storage, comparative analysis, export of data to wordprocessing and spreadsheet programs, and analysis of funds and appeals. In order to best serve the needs of the Sacramento Public Library Foundation (SPLF) using Razor's Edge (hereinafter RE), completion of the training workshop modules is mandatory. This consists of 26 separate modules covering all phases of the RE program. Within these 26 modules, there are 121 separate sub modules. To date (10/15 to 10/18/01), I have completed four modules, consisting of 12 sub modules. In order to serve the needs of the SPLF a complete understanding of the RE program must be established.

The person directly responsible for design, data verification, and maintenance of the RE database should complete the entire training workshop.

Overall Analysis of Conversion Data and Program Design

A fourth data conversion was completed on October 1, 2001, successfully transferring constituent records from FundMaster Lite (hereinafter FM Lite) to RE. All data entered through October 1, 2001 was converted. This data consists of approximately 16,000 individual constituent records. During conversion, many records were converted into inappropriate categories. An overall analysis of the data and the program design should be completed as soon as possible.

The data and program design would be verified within RE. Implementation of this data and program design verification would be accomplished by visually verifying that data is properly categorized in RE. Program design changes and global data changes would be noted and an outline of these changes and corrections would be completed.

Analysis of Entries from August to October 15, 2001

As donations were received during the months of July through October, individual records were being corrected in FM Lite. New data entry protocols were implemented beginning in the new fiscal year (July 2001 to June 2002) to make grouping of donations for analysis purposes easier to track. From August to October 2001, a new data entry person was making donation entries into FM Lite. This individual left SPLF in mid-October. My analysis of that individual's data entry into FM Lite indicates that many errors occurred within the data entry from August to October. Due to this occurrence, all data entries from August to October 15 should be verified for accuracy.

The data be verified within RE due to the fact that FM Lite will no longer be used by SPLF after January 1, 2002 except for verification of previously entered data (this will be addressed later). Implementation of this data verification would be accomplished by running individual constituent record reports from RE using batch record reports from FM Lite. The RE records would then be verified against the actual hard copies received through the mail and the constituent histories (742 transactions). Any necessary corrections would be made in the records of RE only.

Ongoing Entry of Transactions in FM Lite and RE from October 1

Transactions entered into FM Lite from October 1, 2001 (371 individual transactions), must be input into RE. These records need to be entered into FM Lite (as long as that program is still being utilized) as well as being entered into RE.

Data will be entered into both systems using the hard copies and that all data be entered within the parameters of the program design as discussed above.

Correction of Constituent Records Converted from FM Lite to RE

All data entered into FM Lite through October 1, 2001 was converted to RE. This data consists of approximately 16,000 individual constituent records. During conversion, many records were converted into inappropriate categories. These records should be corrected on an ongoing basis.

Individual constituent records will be verified when new transactions are received on that account. The constituent history should be verified by a report through FM Lite and the records corrected during entry of the new transaction. Any necessary corrections would be made in the records of RE only.

Training of Office Personnel

All office staff will be trained to use RE by completing the RE Training Workshop. Training and data entry into RE will be supervised by the Database Administrator.