

My applied studies program started on May 15th, as this was a Thursday I found my first day in a meeting with <insert name>, the Executive Director. In this meeting we again went over my learning plan and summary of projects she would like to see completed. To be honest, I was going in wondering how I could possibly manage to complete all my objectives. <Insert name> seemed unconcerned and noted once again how she would be my guidance and lead me in these projects. My learning/working style is very independent which works well with her management style, which is hands-off unless she is needed. The <insert company name> sees my role in the organization as a staff position and I was able to take part in the staff meeting, which took place first thing on Tuesday (May 20th) after the long weekend. I was able to adjust my regular work schedule and worked from 8am through 12pm that day at the <insert company name>. Being considered as staff is very important to me; it provides a bit more credibility to what I am doing as well as gives me closer contact to the staff who I am finding as invaluable sources of information.

My roles so far have been varied; much of my time so far has consisted of research. I have added a new project to the list which includes getting an information and marketing website for the <insert company name> up and running. I have spent the equivalent of a full shift getting quotes and information on web hosting services available in a price range befitting for a non-profit organization. As I am far from a computer expert I have found this very informative and must admit I have learned more about the back end workings of running a web site than I expected. <Insert name>, the Volunteer coordinator will be the design element of the web site with myself, designing and organizing the donor recognition page once we get the site up and running. I had booked us an appointment with <insert company name> for May 28th to discuss our computers in general as well as their web hosting services. They are the forerunners for our hosting and networking as they have taken the most time with me explaining the necessary components as well as the service commitments required. Web hosting and web management has an approximate cost of \$20 a month; we have also chosen <insert company name> due to the company history with the <insert company name>, as they have been contributors in the past. While this meeting was helpful to learn where we

stand and a rough estimate of upgrades required to even just get all the computers on par, it lacked the information I wanted on web hosting and the procedural requirements of set up. <Insert name> from <insert company name> (which is the gentleman who we met with) is not the one we will be dealing with for the hosting and provided me with a further name to contact for more information. I do feel I got the run around on this service and information from <insert company name>, but I believe this comes from inexperience taking meetings and booking appointments for consulting services, I do know better for next time. <Insert name> who is the <insert company name> board president (also IT for the <insert company name>) has spent some time with me lately showing me the other options in web hosting, he personally uses a company called <insert company name> and gave me a tour of their services and easy set up. While this was a great learning tool, I do believe we will not go with <insert company name> for the simple reason they are based out of the U.S and we would like to be able to contact locally for service issues. Their services are cheaper, but we are looking for ease of use as well as ease of access to possible donors and clients. Once the meeting date is confirmed with the other ”<insert name” from <insert company name> for hosting services I plan on spending a day working on a proposal to ask for hosting services free as a contribution to the organization as well as possible sponsorship of the website if need be. From the initial meeting with <insert name> I did learn however that <insert company name> is a franchise and I will have to request such services from corporate which could take up to 6 months to be looked at for their philanthropic causes.

<Insert company name> has hired a consultant as part of the Wild Rose Foundation grant they received for this year. The consultant’s role is to complete an analysis of <insert company name> performance from the eyes of clients, donors, staff and the community. This was done through a client survey, a donor survey, as well as a discussion meeting with the staff and a few volunteers. The consultant seems to have very little knowledge of the non-profit industry and has largely neglected to take into account volunteer feedback when they were setting up their analysis methods. Since the <insert company name> values volunteer feedback and suggestions I was able to create a volunteer needs assessment survey to catch the missing group. I have attached a copy of

the survey to the e-mail. I was able to use some questions pulled off of the client and donor surveys but I was able to incorporate learning from my marketing research class last semester (MGMT 3220). To be honest I was surprised that any of this course would ever be of use to me outside of the classroom setting; so far I have used many of the techniques used in class to construct and administer the survey. Luckily these responses will be forwarded to the consultant for analysis, as I found the marketing research course lacking in all the proper information to do a thorough analysis. Client, Donor, and Volunteer responses are due to the consultant the first week of June, which did not leave a lot of time to reach most of these groups completely. I was asked to create a public service announcement to be sent out to all media outlets asking for the community to come in and complete surveys. I have attached a copy of the PSA to the e-mail. This was sent to the media May 21st, most media did not pick up on story, CTV did post it to their community calendar but that was the only coverage we received. This has been another valuable lesson for me I have learned non-profits needs to develop close ties to the media to enable more of a message to be disseminated to the public more frequently. I believe the CTV message is due to the <insert company name>'s close tie to <insert name> at CTV. When it comes to <insert name> I do have a relationship built with her already, but if I am going to continue in this sector it would be very beneficial for me to meet and form bonds with other anchors and news people in Lethbridge.

A part of any marketing campaign in a non-profit is fund development. I have been asked to see if there are technology grants available that we can apply for. My first step is to use the resources at <insert company name> and their fund development software to research and print applications for grants, should I find any. I have booked an appointment for training on the software for June 4th. <Insert name> at <insert company name> is going to work with me to see what we can find. This will take me off site, but overall this will be a great learning experience for me should I ever decide to work in the not for profit sector after university. Once we find grants that will serve our purpose it will be my job to complete all requirements of the applications. This will be useful for me as well since much of the funding received by non-profits is grant related. In our meeting with <insert company name> on May 28th we discovered a cost for a needs assessment

survey which will help us discover where we are lacking and exactly what it will take to get all the computers at the <insert company name> to use the same programs and have internet access. The cost will be approximately \$400 for the assessment. <insert company name> may have to pay this cost for the assessment before I am able to apply for technology grants so we can have a rough estimate of how much money it will take to upgrade to at least minimum standard levels for all systems.

In addition to helping to build the website and find hosting I have put in place a tie in with <insert company name>, this is a non profit agency which has a sole purpose of offering secure online services for individuals and businesses to make donations via the internet. This registration process was quite lengthy as they only process donations to non-profits via an electronic funds transfer (EFT) system. They only process new set-ups on Mondays and you do not have access to add or change your profile until you have sent them a void cheque and proper authorization forms. I was able to send the forms and we were finally set up on May 26th. I spent the rest of that Monday creating our profile page and adding additional information. (Please visit <http://www.canadahelps.org/CharityProfilePage.aspx?CharityID=s44534> to view). After discussion with <insert name> I chose to go with <insert company name> and not other non-profit online payment sites designed with the same function, their percentage of retained funds was the smallest at 3%. There were other options available but all were asking for on average 4.5% of the funds. While in essence we are losing some of our funds by offering online donations through <insert company name>, I do believe it is still better to provide the option of online giving to potential donors and to have this service added to our own website would add additional headaches and cost more since we would have to add more security features. Another interesting and useful note I learned about <insert company name> would be that they are responsible for providing contribution receipts to donors, which saves the non-profit time and money and they also provide great detail to the non-profit about the donor who made the contribution. Should I ever work or start up a non-profit again I would make sure they are set up with this service through <insert company name>.

<Insert company name> is a member of a group of companies, non-profits, and government agencies called <insert company name>. These are organizations that have pledged to help Alberta's children and youth improve their lives and future opportunities. It is an honor to be a member, but we are not using this tie in effectively. I have taken it upon myself to update our profile page on the <insert company name> website since this information has not been updated in almost 2 years and in my opinion makes the <insert company name> look needy and almost "whiny" about what we are missing to do our jobs more effectively. This link was set up by the previous Executive Director and just doesn't tie in with our new mission or our present or future goals. There is a link on the <insert company name> website that allows agencies to post their needs. The premise behind that is that all <insert company name> supporters and members should be helping each other out when they can. I am planning on posting a "need" for technology and see what we can bring from this group. From information I have obtained I have learned that many businesses in Lethbridge who are also members tend to stick to making donations strictly to other <insert company name> agencies. This will be great information to have, as we can take advantage of this tie in further promotions for the <insert company name>. Once we get the website up and running we will also be able to add their logo to show that we are a proud member, this may work well to improve corporate donations from Lethbridge and surrounding communities.

On Friday May 23rd we were booted off the computers and were asked to leave the office since our food manager was painting the floors before we put in the new furniture. While it was not part of my course I was asked to help label a mail-out for our May promotion called the Bakeless Bake Sale. We had an agreement with Canada Post upon where if we kept all envelopes in order (all the way down to the last digit in the postal code) they would give us a \$0.10 discount per piece on mail. This is great to know and will be useful in whatever job I may have in the future, since postage is always a large cost whether it be for profit or not-for-profit companies. We completed the 6000-piece mail-out in 2 days with the help of 4 volunteers and all of the staff working diligently. The reason I mention this is to note that looking at the labels that their donor software creates I was not impressed. I work at a stockbrokerage firm currently where I

create labels and professional looking mail outs on a regular basis, should my labels ever looked like these, I guarantee I would be fired without reference. One thing I have brought from my job at the brokerage firm is the understanding that while yes we are a non-profit, we are still a business and therefore need to be professional to some degree. A label with a name written like JoHn smith would make me as a donor throw away the message thinking the agency doesn't pay attention or make an effort. This is something I need to fix. Looking for a technology grant is the first step so we can buy new software, but if that isn't going to work I will be taking the time to correct all the errors in the database for the donors we have now. I feel this is potentially losing them thousands of dollars a year in donations.

I would like to note as well that I have started on both the planned giving program as well as the donor recognition portion of my project but I have hit a few snags. Trying to differentiate our donor recognition will be hard since there are so many non-profit agencies in Lethbridge. I will have to do further research into possibilities that I can pick up from Calgary agencies or come up with something brand new and innovative. I will point out though, my creative skills are lacking so this may be an opportunity for me to learn to think outside the box and become more creative. I am also finding similar problems with the planned giving, I have noticed that many organizations have a description of this and ways to go about it on the web but very few people take the time to read it, this is complicated matter for people to understand. I believe is just easier for donors to continue to write cheques when they don't understand. My goal in the next few weeks will be to talk to a few insurance companies and brokerage firms to see if there are ways to partner with the <insert company name> to help promote the planned giving programs to their clients on our behalf. Even if people will choose to set up long term giving plans to other agencies, getting the word out that this is an option in estate planning will benefit the <insert company name> in the long run.

After 2 weeks at the <insert company name> I feel I have made large amounts of progress and have already contributed to the organization in a positive way. Having this hands on experience has taught me more than I expected in a short amount of time. Most

importantly I believe I have gained experience in business research and in the technology area specifically the Internet and computer components. I am excited for the upcoming weeks as we see the website come online as well as the <insert company name> profile page change. While I am dreading the donor recognition and planned giving, I am up to the challenge of what comes next.