

# School of BCRM

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*2018 Course Catalog*

## The School of BCRM

To promote usage of BCRM throughout all JA Areas, JA USA compiles all BCRM training resources into the School of BCRM. This includes instructor-led webinars that will be conducted throughout the year, as well as self-paced resources like online videos, the reference guide, and practice labs.

The School of BCRM is a great resource for new JA Area Staff as well as existing Staff who wish to expand their knowledge of BCRM. Additionally, JA USA is adding more resources to the School of BCRM to expand our curriculum to more advanced topics.

## Courses

### Instructor-Led Webinars

These courses are paced throughout the year. Some courses target beginners and others cover deeper information for those who wish to expand their knowledge and usage of BCRM.

#### Available Webinars

The following table outlines the courses to be delivered through November of 2018.

Course	Description	Duration
Constituents	Every individual, group, committee, and organization in BCRM is considered a constituent. In this introductory course, learn how to properly manage constituents in BCRM.  Topics: Searching for and adding constituents, managing the relationships between constituents, managing board members in BCRM, smart fields, and reports.	1 Hour
Custom Correspondence	Custom correspondence in BCRM allows the user to take the results of any query and merge them into a letter, report, memorandums of understanding, or anything else that can be conceived.  Topics: Creating and editing letters, finding pre-existing letter templates on the intranet, processing letters, and sending letters either as paper documents or via email.	1.5 Hours
Event Management Basics	Any gathering of constituents is considered an event in BCRM. This introductory course covers the basics of tracking these gatherings in BCRM.  Topics: Creating events in BCRM, assigning event related tasks to individuals, managing volunteers, and attaching revenue to an event.	1.5 Hours
Event Participants	Without participants there are no events. This introductory course covers tracking event attendees.  Topics: Registration options, event payments, invitations, event registrations, and a comparison of preferences and attributes.	1 Hour
Event Walkthrough: Auction	Auctions provide much needed revenue for JA Areas. Learn how to manage your auction from beginning to end in this course.  Topics: General event configuration, invitations registrations, registrations, registrant attributes and preferences, seating configuration, seating assignments, follow-up, and reports.	1 Hour

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The following table outlines the courses to be delivered through November of 2018.

Course	Description	Duration
Event Walkthrough: Board Meeting	<p>Tracking Board Meetings in BCRM allows BCRM to be your one stop shop for all of your board member information.</p> <p>Topics: General event configuration, invitation registrations, registrations, registrant attributes and preferences, seating configuration, seating assignments, follow-up, and reports.</p>	1 Hour
Event Walkthrough: Bowl-A-Thon	<p>Bowl-A-Thons are a celebration of all the hard work fundraisers do on JA's behalf. Keep the party going by tracking logistics and participation in BCRM.</p> <p>Topics: General event configuration, invitation registrations, registrations, registrant attributes and preferences, seating configuration, seating assignments, follow-up, and reports.</p>	1 Hour
Event Walkthrough: Golf	<p>Golf events take long hours of meticulous planning to be successful. Track all of the details in BCRM this year to reuse it next year.</p> <p>Topics: General event configuration, invitation registrations, registrations, registrant attributes and preferences, seating configuration, seating assignments, follow-up, and reports.</p>	1 Hour
Event Walkthrough: Hall of Fame/Gala	<p>Galas are large events with numerous working parts. Track the details in BCRM, to create one place for all event related information.</p> <p>Topics: General event configuration, invitation registrations, registrations, registrant attributes and preferences, seating configuration, seating assignments, follow-up, and reports.</p>	1 Hour
Event Walkthrough: Team Fundraising	<p>Team Fundraising provides a powerful tool to track donations raised on JA's behalf, ensuring both the solicitor and donor are properly credited.</p> <p>Topics: General event configuration, fundraiser registrations, team set-up, team set-up goals, allocating revenue to fundraisers, and reports.</p>	1 Hour
JA Engage	<p>JA Engage provides volunteers the opportunity to sign up for classes and update their personal information on their own.</p> <p>Topics: Benefits of using JA Engage, marketing using JA Engage, JA Engage from an end-user perspective, JA Engage from a program manager's perspective, go-live tasks, and a walk through of site configuration.</p>	1 Hour
Program Management: Data Entry	<p>BCRM is only as good as the information entered. This introductory course covers entering all necessary program information.</p> <p>Topics: Adding and searching for schools, volunteers, and educators, and the class flow process, from entering the class to verifying the class.</p>	1.5 Hours
Program Management: Data Management	<p>Once data has been entered into BCRM, it can be used to track numerous aspects of program management.</p> <p>Topics: Class management, blocking unqualified volunteers, ordering and tracking kits, interactions with volunteers, verifying classes, class variances, capstone programs, school sponsorships, and program management best practices.</p>	1 Hour
Program Management: Data Extension	<p>Learn how BCRM's other functional areas can be used to simplify program management.</p> <p>Topics: Using custom correspondence, program reports and queries, using the event module to run a JA in a Day, prospecting schools, targeting specific volunteers, volunteer retention, and using other areas of BCRM to meet program needs.</p>	1.5 Hours

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The following table outlines the courses to be delivered through November of 2018.

Course	Description	Duration
Prospects	Prospecting is the process of making a large ask that takes several small steps and various people to work up to the actual ask.  Topics: Setting up and managing prospect plans, comparing appeals and opportunities, and reporting.	2 Hours
Queries in Bite-sized Pieces: The First Bites	Queries are the best way to pull specific information back out of BCRM. This course provides an introduction to queries in BCRM.  Topics: Basic query information, defining the need, an overview of the interface, practical information, and troubleshooting tips.	2 Hours
Queries in Bite-Sized Pieces: The Crunchy Bites	Query results can be baffling without some small adjustments to make them easier to comprehend.  Topics: Advanced filtering, smart fields, aggregations, examining results, selections and how to use them, and exporting information.	1.5 Hours
Queries in Bite-Sized Pieces: The Chunky Bites	The art of query writing is constantly refined by building on the work of others.  Topics: Merging selections and smart queries.	1 Hour
Revenue	While BCRM is not an accounting software, it can be used to track gifts from constituents. This introductory course covers the revenue lifecycle from entering revenue, to acknowledging and reporting gifts received.  Topics: Using batches, adding pledges and payments, tracking solicitors, soft credits, deposits, posting revenue, reconciling revenue, and reporting.	2 Hours
Revenue Correspondence	The first step to the next gift is a thank you. BCRM can automate the acknowledgement process, taking care of the most important part of a gift's life cycle.  Topics: Creating and editing letters, letter templates on the JA Intranet, processing letters, and sending letters via mail vs. email.	1.5 Hours

## Calendar of Webinars

The following table outlines the dates when each webinar will be delivered. These webinars will start at 10:00 AM Mountain Time and last for the duration indicated above.

Month	Webinar	Date
April 2018	Constituents	Wednesday, April 11, 2018
	Program Management: Data Entry	Wednesday, April 18, 2018
May 2018	Program Management: Data Management	Wednesday, May 2, 2018
	Event Management Basics	Wednesday, May 16, 2018

## Calendar of Webinars

The following table outlines the dates when each webinar will be delivered. These webinars will start at 10:00 AM Mountain Time and last for the duration indicated above.

Month	Webinar	Date
	Event Participants	Wednesday, May 23, 2018
June 2018	Prospects	Wednesday, June 6, 2018
	JA Engage	Wednesday, June 13, 2018
	Revenue	Wednesday, June 20, 2018
July 2018	Revenue Correspondence	Wednesday, July 11, 2018
	Program Management: Data Extension	Wednesday, July 25, 2018
August 2018	Custom Correspondence	Wednesday, August 1, 2018
	Queries in Bite-sized Pieces: The First Bites	Wednesday, August 8, 2018
	Queries in Bite-Sized Pieces: The Crunchy Bites	Wednesday, August 29, 2018
September 2018	Queries in Bite-Sized Pieces: The Chunky Bites	Wednesday, September 12, 2018
	Event Walkthrough: Bowl-A-Thon	Wednesday, September 19, 2018
October 2018	Event Walkthrough: Hall of Fame/Gala	Wednesday, October 3, 2018
	Event Walkthrough: Auction	Wednesday, October 10, 2018
	Event Walkthrough: Team Fundraising	Wednesday, October 17, 2018
November 2018	Event Walkthrough: Golf	Wednesday, November 7, 2018
	Event Walkthrough: Board Meeting	Wednesday, November 14, 2018

## Registration Process

Every month, JA USA will publish the signup form for training in the following month. For example, in March, the signup for the April courses will open. Each course is limited to 40 attendees, so be sure to sign up early. The courses are provided free of charge to all JA Areas. But there is a penalty of \$50 for any staff who doesn't show to the course. Attendees may cancel up to 2 business days in advance without incurring the penalty.

## Accessing the Courses

All meetings will be held online. Upon registering for a course, registrants will receive a calendar invite that includes the information on how to access the webinar. Please accept this calendar invite as this will be added to your calendar with reminders prior to the start of the meeting.

## Self-Paced Online Training

In addition to our webinars, JA USA provides a full suite of short videos where you can learn about BCRM. These videos are broken down by topics and are easy to reference again and again through your usage of BCRM. JA USA recommends that all onboarding staff complete the videos prior to using BCRM.

The videos are available through the JA Learning Platform under the School of BCRM (<https://access.ja.org>). If you don't see the School of BCRM under your available courses, contact your local JA Learning Platform administrator.

### Available Self-Paced Online Training

The following table outlines the self-paced courses available through the JA Learning Platform.

Course	Description	Modules
Overview	<p>The School of BCRM Overview covers BCRM basic navigation, using the BCRM Home Page, Shortcuts and how to View a Record.</p> <p>Audience: All JA Area Staff</p> <p>Modules: Navigating the Functional Areas, Using the BCRM Home Page, Using Shortcuts, Viewing a Record</p>	4 Modules
Constituent Management	<p>Constituent management is composed of several interactive learning videos to guide all users on how to add, edit, and manage all types of constituent records, including Program-related constituents, Donors, Board Members and more.</p> <p>Audience: All JA Area Staff</p> <p>Modules: Adding an Organization, Adding an Individual, Adding Constituencies, Updating Primary Addressee and Salutation, Adding a School District, Adding a School, Adding a Principal, Adding a School Coordinator, Adding a Superintendent, Adding an Educator, Adding Training to Educators, Adding a Volunteer Organization, Adding a Volunteer, Adding a Volunteer Coordinator, Adding Training to Volunteers, Managing Volunteer Qualifications, Managing Volunteer Preferences, Adding Major Donor Organizations, Adding Donor Organizations, Adding Individual Donors, Adding a New Constituent as a Funding and Primary Contact, Adding Funding and Primary Contact to an Existing Constituent, Adding the Board of Directors Committee, Adding Members to Committees, Adding Board Members</p>	25 Modules

## Available Self-Paced Online Training

The following table outlines the self-paced courses available through the JA Learning Platform.

Course	Description	Modules
Program Management	<p>Designed to guide Program Managers through day-to-day activities such as adding and managing classes, volunteer recruitment, and how to build custom correspondence letters to reach Educators and Volunteers.</p> <p>Audience: JA Area Program Managers</p> <p>Modules: Initiating a Class, Copying Classes Individually, Copying Classes in Bulk, Matching Classes to a Volunteer Using Suggestions, Marking Classes Complete, Verifying Classes Individually, Verifying Classes in Bulk, Resolving Verification Errors on Classes, Adding Volunteers Using Batches, Adding Educators Using Batches, Adding Classes Using Batches, Adding a Volunteer Prospect Plan, Adding a Volunteer Sponsorship Opportunity, Using My Fundraiser Page to Manage Volunteer Recruitment, Adding a Letter Template, Copying the Query, Adding the Custom Correspondence Process, Running the Custom Correspondence Process</p>	19 Modules
Development	<p>This training module is designed for Development and Fundraising JA Area associates. The videos include how to add and manage Prospects, Appeals, Campaigns and Grants.</p> <p>Audience: JA Area Development Staff</p> <p>Modules: Adding an Appeal, Adding Constituents to an Appeal, Tracking Appeal Responses, Adding Prospect Plans, Adjusting Prospect Plan Steps and Dates, Managing Opportunities in Prospect Plans, Adding Contact Reports to Prospect Plans, Adding Stewardship Plans, Using My Fundraiser Page to Manage Prospecting, Adding a Campaign Hierarchy, Adding Fundraisers to a Campaign, Adding Goals and KPIs to a Campaign, Viewing Funding Efforts on Campaigns, Managing Designations on Campaigns, Copying Existing Campaigns, Running Campaign Reports, Adding Grantors, Adding Grant Programs, Adding Funding Plans</p>	19 Modules
Revenue	<p>This module includes videos for revenue management in BCRM. Revenue letters such as Acknowledgements and Pledge Reminders (invoices) are also part of this e-Learning module.</p> <p>Audience: JA Area Finance Staff</p> <p>Modules: Adding Pledges Using Batches, Adding Payments Using Batches, Adding In Kind Donations Using Batches, Creating Deposits, Adding Acknowledgement Export Definitions, Preparing the Acknowledgement Merge Fields, Adding the Acknowledgement Process, Running the Acknowledgement Process, Scheduling the Acknowledgement Process, Updating Acknowledgement Letters, Adding Reminders Export Definitions, Preparing the Reminder Merge Fields, Adding the Pledge Reminder Process, Running the Pledge Reminder Process, Scheduling the Pledge Reminder Process</p>	15 Modules
Queries and Reports	<p>Designed to walk BCRM users through building and using queries to obtain the needed information.</p> <p>Audience: All JA Area Staff</p> <p>Modules: Introduction to Output, Creating Ad-Hoc Queries, Creating a Selection Query from an Existing Query, Using Selections As Filters, Exporting Queries</p>	5 Modules

## Questions

Still need more info? Please do not hesitate to contact the JA USA IT Help Desk by email at [helpdesk@ja.org](mailto:helpdesk@ja.org) or by calling us at (719) 540-6120.