

Using Technology to Advance Your Mission

**Not-for-Profit Leadership Summit VI
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Rye Town Hilton**

Presenters: Ken Belfer and Dale Mottola

Workshop Outline

1. Technology Planning
2. Technology on a Not-for-Profit Budget
3. How Technology Can Help Achieve Your Mission
4. Q & A with Panel

Technology in Your Organization

- **Does Your Organization Have Information Technology Staff?**
- **Are You the Person Responsible for Technology Decisions?**
- **How would you rate the computers in your organization?**
 - Very up to date
 - Slightly out of date
 - Candidates for Historical Preservation Designation
- **How would you rate the software used in your organization?**
 - Adequate for our needs
 - Does not completely meet our needs
 - Insufficient for our needs
- **What would you like to get out of this workshop today?**

The Myth of Catching Up with Current Technology

Factors to Consider:

- Cost
- Needs
- Compatibility

What Is a Technology Plan?

Similar to a business plan, but specific to technology:

- A roadmap on how technology can be used to support the work of the organization
- A practical plan - covering hardware, software, training, support, budget and timeline

How do you create a technology plan?



Technology Planning Steps

1. Establish Leadership and Support
2. Assess Existing Resources (Inventory hardware & software)
3. Define Your Needs (What you want to accomplish, priorities)
4. Research Solutions (Using consultants as needed)
5. Draft Written Plan (Include vision, budget, projects/tasks, timeline)
6. Get Funding
7. Implement the Plan (Assign Responsibilities)
8. Evaluate Success
9. Update Plan Based on Real Life, Changing Needs

Benefits of a Technology Plan

- It identifies needs, problem areas, and priorities
- It forces you to be realistic and make choices in line with the size and resources of your organization
- It values people as well as technology, ensuring that people will learn to use the technology appropriately and efficiently
- It helps you apply for technology funding

Successful Technology Planning Requires:

- Leadership commitment within organization to technology, and to the financial and human resources that will be required



Follows 70-30 Rule

- 30% on hardware/software
- 70% on people who will design programs, train staff, use computers, support systems
 - This includes staff, consultants and trainers
- This is an *annual* rule - includes:
 - **Upgrades** to current software
 - **Support**
 - **Ongoing** costs of use (e.g. internet access, replacement of printer/fax toner)
 - **Ongoing** professional development

Sample Technology Plans

- Senior Tech Center, Madison, WI.
 - http://www.seniortechcenter.org/tech_planning/sample_tech_plan.php
- TechSoup Sample Technology Plan
 - http://www.techsoup.org/binaries/Files/Sample_Technology_Plan1.doc
- Technology plan of small/rural library in Texas
 - <http://www.netls.org/Technology/tecplan1.htm>
- Association of Independent Maryland Schools
 - <http://www.aimsmd.org/upload/SampleTechPlan.pdf>

Do I Need a Huge Budget to Make Use of Information Technology?

- Low Cost Ways to Purchase Hardware/Software
- Open Source
- On-site vs. on-demand software/licenses

Low Cost Hardware Acquisition

Westchester PC Users Group

PCRenew Program

www.wpcug.org

- A Microsoft Authorized Refurbisher, WPCUG repairs computers for nonprofits and needy individuals in Westchester County, NY.
- This program is available to charities, qualifying schools and qualifying access programs.
- It also offers technical assistance through its 450-member nonprofit, volunteer computer club.

Gifts in Kind

Local Affiliate Administered by
United Way of Westchester and Putnam

www.giftsinkind.org/charities



A Proud Affiliate of Gifts In Kind International

[Back to Gifts In Kind International's Affiliate List](#)

Gifts In Kind International Affiliate:
United Way of Westchester and Putnam

United Way of Westchester and Putnam is a local, volunteer-led organization that brings together people and resources to impact our area's most pressing health and human service issues and create positive change in the lives of those who live and work here. From Yonkers to Yorktown, Port Chester to Peekskill and Greenburgh to Garrison, United Way is working year-round to nurture children and youth, strengthen families, foster independence for seniors, promote health and wellness, embrace diversity and increase self-sufficiency.



Gifts In Kind White Plains

Get involved by donating goods or products to agencies in need or by becoming an agency participant in the Gifts In Kind program.

Our Gifts In Kind program assists companies and individuals who want to donate products or goods to a not-for-profit organization. Because we maintain a database of agency's product needs, we are able to distribute these donations in a timely and effective way. This enables the hundreds of agencies involved in this program to spend more of their limited budgets to provide services.

From computers to personal care products to teddy bears and office furniture, United Way's Gifts In Kind program connects people with donations to the agencies that need them.



United Way of Westchester and Putnam
Gifts In Kind Contact Info

Arlene Angelmaier Gifts In Kind Coordinator
336 Central Park Avenue
White Plains NY 10606
Telephone: (914)997-6700 Fax: (914)949-6438
Email: aanqelma@uwwp.org

TechSoup Recycled Computer Initiative (RCI)

www.techsoup.org/stock

Qualified nonprofits* can choose from a range of high-quality, guaranteed, refurbished Windows-based desktops and laptops. Organizations may request up to 10 products each fiscal year. Offers workstations and laptops with Pentium III or 4 processors with Windows 2000 OS. Administrative fee ranges from **\$178 to \$375** each.

TechSoup (www.techsoup.org/products) lists links to other resources regarding hardware recycling

* 501(c)(3) U.S. non-profit with an annual budget of less than \$20 million

Other Resources for Low Cost Hardware

TechFoundation

www.techfoundation.org - click on "TechMarketplace"

- Purchase from TechFoundation partners with discounts of up to 35%
- Membership in TechFoundation is required

Per Scholas

www.perscholas.org - click on "Affordable Computers"

- Purchase brand name, reconditioned corporate Pentium III computers
- \$195 plus shipping
- Per Scholas also partners with non-profit organizations to get computers into the hands of those who need them.

Low Cost Software Acquisition

TechSoup Software Donation Program

www.techsoup.org/stock

TechSoup Stock connects nonprofits and public libraries with donated and discounted technology products.

Choose from over 240 products from companies such as Microsoft, Adobe, and Symantec.

Microsoft's Software Donation Program

- Must be a U.S. nonprofit with valid 501(c)(3) status*.
- May request up to 6 software titles and up to 50 user licenses per title, every two year period. See the TechSoup website for further details.

Comparison of Retail vs TechSoup:

Microsoft® Office 2003 Professional Edition - Full Version

Staples.com \$439.99

TechSoup \$20.00 (admin fee)

*Microsoft products are not available for distribution to educational institutions (including K-12 schools, colleges, universities, and trade schools), political organizations, religious organizations (except for those with a secular community designation), healthcare networks and healthcare research organizations, or private foundations.

Other Resources for Low Cost Software

Gifts in Kind

TechFoundation

Open Source Software

- Non-commercial, public domain software, usually free
- Available as freely downloadable, no-cost software, but needs greater technical knowledge
- Also available as a hybrid of open plus proprietary, where less technical knowledge is required. These more user-friendly versions may have licensing fees, and paid technical support is often available.
- Hybrids still offer savings over pure proprietary software.

Examples of Open Source Software

OpenOffice

<http://www.openoffice.org>

The leading open-source office software suite for word processing, spreadsheets, presentations, graphics, databases and more. It is available in many languages and works on all common computers. It stores all your data in an international open standard format and can also read and write files from other common office software packages. It can be downloaded and used completely free of charge for any purpose.

Another Example

Lotus Symphony

<http://symphony.lotus.com>

IBM® Lotus® Symphony™ is a richly-featured set of productivity tools that are intuitive and easy to use and provided at no charge. Lotus Symphony puts you in charge – take control over spiraling upgrade costs, ensure access to documents well into the future with new standard file formats (ODF), get more from your current investments with support for Microsoft® Windows® and Office file types.

More Information

Non-Profit Open Source Initiative
<http://www.nosi.net/resources/primer>

Lists free and open source tools that can help non-profit organizations realize their goals and mission

On-demand vs on-site technology

- On-demand (aka SaaS - Software as a Service) means a third party hosts the application
- On-demand allows easy access anytime from anywhere you have an Internet connection
- On-demand has low hardware and maintenance costs
- On-demand means backups, upgrades, security, and scalability are taken care of for you
- On-demand applications often do not have the same level of functionality and sophistication as the traditional Office products (eg. Excel, Powerpoint)

On-demand vs on-site technology

- On-site (aka premise-based servers) means you host the applications
- On-site requires additional security for anytime/anywhere access
- On-site requires infrastructure (servers, LAN, routers, etc) and the people who manage it
- On-site means you are responsible for backups, upgrades, security, scalability and disaster preparedness
- On-site software provides total control

Examples of On Demand Applications

Google Apps

<http://www.google.com/a>

Google Apps can help your whole organization communicate efficiently, work together effectively, and keep you safe and secure. Hosted solutions for email and instant messaging, shared calendars, and collaborative documents and sites.

Salesforce.com

<http://www.salesforce.com>

The proven leader in on-demand customer relationship management (CRM), plus availability through its AppExchange of many other applications that support human resources, finance and administration, and many others. License donations for eligible nonprofits (click on "Foundation").

Do You Have to Choose One or the Other?

- As with most technologies, there are strengths and weaknesses in both on-demand and on-site applications
- Some combination of both on-demand and on-site applications may best serve your nonprofit's specific requirements

Ways Technology Can Help You Achieve Your Mission

- Tools for Getting Your Message Out
- Fundraising
- Tracking Information and Outcomes
- Is Going Paperless an Option?

Traditional Tools

- Website

- often is the first impression of your organization, so don't neglect it
- can be as simple as an online brochure (static)
- can be more dynamic, with frequently changing information, such as an online calendars, invite user input

Traditional Tools (cont'd)

- Online newsletter
 - cost effective -- no postage costs
- Listserv (email distribution list)
 - simplified list management
 - one-way communication (announcements)
 - two way communication (discussion group)
 - premise hosted or third-party hosted

New Tools

Web 2.0 -- What Is It?

- Refers to a "second generation" of Internet-based services
- Encompasses a variety of tools that can enable your nonprofit to collaborate and share information online

Examples of New Tools

- Social Networking Sites
 - having a presence on popular social networking sites, such as MySpace and Facebook, can help increase the number of database records and discover new potential supporters
- Videos
 - your nonprofit's "30 second commercial" can be posted on YouTube, your own website, and can be passed along to others. Videos provide another tool to help constituents become marketers and fundraisers for the organization.

More New Tools

- **Blogs**

- your nonprofit's "online diary". Used to keep constituents informed about activities and events, usually in reverse chronological order.

- **Wikis**

- your nonprofit's online discussion group

- **Audio**

- A quick verbal explanation of the organization's mission or a personal story is a good way to address constituents who are verbal learners.

Old Vs. New Tools

From a blog at www.joedrumgoole.com:

- Web 1.0 was about companies, Web 2.0 is about communities
- Web 1.0 was about homepages, Web 2.0 is about blogs
- Web 1.0 was about lectures, Web 2.0 is about conversation
- Web 1.0 was about advertising, Web 2.0 is about word of mouth
- Web 1.0 was about owning, Web 2.0 is about sharing
- Web 1.0 was about Netscape, Web 2.0 is about Google
- Web 1.0 was about web forms, Web 2.0 is about web applications
- Web 1.0 was about hardware costs, Web 2.0 is about bandwidth costs

More Information on Web 2.0

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Get details as they become available
by signing up on WNTC's listserv

Using Technology for Fundraising

Event Registration

- On Your Web Site
- Using a Service with a Landing Page

Free Solutions for Donor Tracking

- Microsoft Word (Using Data Sources and Mail Merge)
- eTapestry (free for up to 500 records)
- Metrix (developed by Fund for City of New York)
- BasicFunder (Jellyware)
- Willow Mountain Giving Database
- Salesforce.com (10 user licenses free if qualified)
- VisibleResults (Open Source)

Fundraising

Inexpensive Solutions

- Donor Access (cost approx. \$500)
- FileMaker Donations
- FundRaiser Basic
- eTapestry (from Techsoup Stock for \$60/1 user)
- Exceed! Basic by Telosa (Techsoup - \$45/1 user)
- GiftWorks (Mission Research)

High-End Solutions

- The Raiser's Edge (Blackbaud)
- AuctionPay

For help see: Donor Management Software Comparison Chart

www.techsoup.org

Tracking Information and Outcomes

More and more funders are demanding that not-for-profits track and report on outcomes of their work.

- Using Generic Databases and Customizing Them
 - Advantages
 - Free or Low Cost
 - Readily Adaptable
 - Disadvantages
 - May require Database Programmer to Set Up
 - Need to think it out from scratch
 - Fields, tables, relationships

Tracking Information and Outcomes

Free or Low-Cost "Generic" Solutions

- OpenOffice.org base
- Microsoft Access 2007 (\$14 - techsoup)
- MySQL (free for non-commercial apps.)
- Oracle Express Edition

High End "Generic" Solutions

- Microsoft SQL 2005 Server (\$240 Techsoup)
- IBM Informix (\$2,000 list price)
- Oracle Enterprise Edition

For Help: "Database Planning Guide" on www.techsoup.org

Outcome Measurement

Professional "Customized" Software

- Advantages

- May come customized for your "industry"
- May be user friendly
- May be modular (you buy the modules you need)

- Disadvantages

- Cost (start-up and ongoing)
- May be difficult to change fields or reports
- May require a high-priced consultant to maintain

Outcome Measurement

Professional Case Management "Outcome" Software

- Efforts to Outcomes (ETO) by Social Solutions (web-based)
Price ranges from \$7,500 to \$60,000, plus annual fees
- ClientTrack by Data Systems International (web-based, I.E.)
- MetSYS (web or server-based, Light or Enterprise versions)
- Service Xpert Suite by Unicentric (web-based, \$25-\$50K/yr)
- Foothold Technology
- Helping Hand Software
- Outcome Tracker by VistaShare
- RClient by Great Lakes Behavioral Research Institute

Is Going Paperless an Option?

Can I eliminate paper completely?

Not likely!

What can I gain by storing records electronically?

According to Ikon:

7.5% of all documents get lost

3% of documents get misfiled

Labor costs of paper handling:

Up to \$20 to file a document

\$120 to find a misfiled document

\$220 to reproduce a lost document

Going Paperless

Case Management Software enables digital client files

Unless your funder requires you to keep hardcopy files

Electronic file storage increases document retrieval efficiency

Push of a button

Can control security (who has access, levels of access)

Scanners are not that expensive

Photocopy machines can serve as scanners (pdf, jpg, tiff)

Uses include

Personnel Files

Accounting Records (e.g., accounts payable invoices)

Document Storage and Retrieval

To Save a Modest Number of Documents

- Good system of folders

- Naming system that facilitates retrieval

- Must address security and backup of data

To Save Large Numbers of Documents

- Need a Document Management System

 - Stores docs in a central location

 - Built in system for indexing files

 - Limits access to specified individuals

 - Provides access levels (read, change, add, delete)

 - Audit trail (tracks who makes changes)

 - Makes document retrieval easy

 - Uses Optical Character Recognition (OCR)

Scanning Equipment & Software

Equipment for Scanning

Simple, inexpensive scanner

Multifunction fax/printer

Commercial scanners

Your (digital) photocopier machine!!!

Examples of Software

OpenDocMan by Logical Arts (? free, open source)

Salesforce Content

Document Locator by ColumbiaSoft

Disclaimer

None of the for-profit vendors providing hardware or software that are cited in this presentation are recommended by, or endorsed by, the Westchester Not-for-Profit Technology Council.

The material is provided for information purposes only.

If looking to acquire any of the products mentioned here, do due diligence to determine what is cost effective and best meets your needs.

Organizations Created to Help

- NPower
 - <http://www.npower.org/>
- NTEN
 - <http://www.nten.org>
- TechSoup
 - <http://www.techsoup.org/>
- Westchester Not-for-Profit Technology Council (WNTC)
 - <http://www.wnptc.org>

WNTC Programs

- Low Cost Training

Through joint sponsorship with Pace University, participants from Westchester not-for-profit organizations receive software training at the significantly discounted fee of \$60 day.

- Low-Cost Website Development

Through a Pace University program utilizing student volunteers, organizations can have their websites designed or improved. Pace faculty and volunteer consultants from the WNTC monitor the students for quality and commitment. Website maintenance training is provided.

- Breakfast Bytes Series

Quarterly 90-minute seminars on a variety of topics.

These programs are made possible with the support of



Q & A with Presenters and Panel

Panel Members:

Jacqui Phillips, Director of Quality Management & Training
Richmond Community Services

Hannah Gross, Training Coordinator
Westchester Child Care Council

Lana Leon, Director of Information Technology
Westhab