Section 6: Identifying Priorities & Research Techniques

Identifying Priorities in Your Plan: An Overview

By August, 2002 as part of your organization's participation in the KIT Program, you will have completed the following steps to help your technology team identify the gap between your technology vision statement/goals and your existing technology infrastructure.

Completed the first and second consults with the generalist
Generated a technology vision statement and wish list
Solicited some stakeholder input on the vision/goals and existing technology issues
Completed your organizational assessment
Received a memo from the generalist consultant summarizing the discussion about vision and goals and key issues
Completed an on-site visit with the technology specialist
Received a memo from the technology specialist describing your organization's current technology infrastructure issues and options for upgrades/improvement

Having all this information in hand, your technology team is ready to ask, "What are the most important goals that we need to implement first? What additional research do we need?" At this point in the process, it is helpful to use the following tools included in this section designed to help you think through some of the detailed implementation steps before sitting down to write the first draft of your technology plan. The generalist consultant will be available via phone and email to assist you in the task.

Most organizations will not have all the resources and capacity to develop detailed action plans for every technology need identified through the planning process. Therefore, it is wise to settle on the most important to pursue. For example, your organization may decide that a redesigning its web site and crafting an email strategy is most pressing or hardware upgrades and new database system is more important.

Before you can turn to drafting your plan, there may be a need for some additional research. You may want to undertake some field research and find out how other arts organizations have a solved a particular problem. Posting queries to the KIT Listserv is a very efficient way to accomplish this task. Or it may be necessary to research and evaluate potential vendors.

And finally, your technology team may need to do embark upon "technology learning," so your organizations can make the best informed decisions as part of the drafting the technology plan. To help you, we have provided a collection of brief content guides on specific technology topics at the end of this chapter.

Using Outcomes-Based Thinking: Logic Models

Outcomes-based thinking is a systematic way to assess the extent to which a program, project, or plan has achieved its intended results. It helps create focus and ultimately answer the question, "How do we know if our mission-driven use of technology is successful?" For example, the use of outcome-based thinking can help you determine whether or not the new database system that you implemented a year ago is having the desired result.

Outcomes-based thinking is used in planning as well as evaluation of an organization's program or plan. As a planning tool, it can help focus attention on the most important issues, identify training and resource needs, and provide direction. It can greatly enhance funding proposals because it can help you describe the benefits and impact of your organization's use of technology and how to measure it.

The logic model is an outcomes-based measurement tool that helps you clarify goals, identify activities and resources needed to carry out those goals and identifies the changes and concrete measurable results.

How To Use Logic Models

Step 1. Define clear goals

This should be a one-sentence statement that captures what basic goals you have for your technology plan. Describe what you are doing and why? For example:

- *Our revised website will provide our clients and the public the information they need to understand our services and stay in closer touch with our agency.*

- *High speed Internet access and email accounts will make it possible for staff to improve their knowledge, networking abilities and skills.*

- *The new fundraising software package will enable us to target our fundraising efforts more effectively and produce timely reports to donors about our activities.*

Step 2. List all the activities you will need to complete to bring this initiative to life.

Listing tasks in detail will help you understand the resources you need to succeed. After you brainstorm the list, put the activities onto the form in a sequence that makes sense. Begin to fill in the detailed timeframe and the people responsible for the tasks. In some cases the activity listed will be self-explanatory and in other cases the people responsible will have to develop a deeper list of things to do to complete the task. This is something that the team should not do at this point. Either delegate this out to a subgroup or reconvene once completing all the columns in your logic model.

Step 3. Describe all the resources you will need to implement this goal?

These may include:

- ∇ Time (staff, volunteer)
- ∇ Physical Space/Facilities
- ∇ Attitude
- ∇ Human Resources
- ∇ Equipment
- ∇ Supplies
- ∇ Policies
- ∇ Money
- ∇ Information
- ∇ Knowledge

Step 4. Describe the desired changes from the particular goal.

Changes are benefits or outcomes that occur during or after a technology goal is being implemented. Questions you can use to help you frame your thinking are:

- What will change as a result of your efforts?
- What knowledge/opportunities will people have?
- What will be the ultimate impacts of the initiative?

For example a **change** from using new fundraising software might be:

* Appeal letters are sent out and acknowledged on a more timely basis

5. What are the concrete results?

Results are the direct products of activities and usually are measured in terms of the volume of work accomplished – such as numbers of clicks on a web page, new members signed on, or documents collaborated on by staff.

For example an result of a new web site you develop may be:

- $13,000 more than last year in donations from fall fund drive from existing donor base
- 455 new members signed up online
- Noticeable decrease in incoming calls requesting basic program materials

Adpated from "Technology Planning Logic Models" by Marc Osten, Summit Collaborative Consulting and used with permission.

Additional Resources on NYFA's SpiderSchool

We have spent much time exploring and evaluating resources on the web on this topic and have included additional resources in SpiderSchool. To get up to speed quickly on this topice, we've included the articles -- they are excellent places to start learning more about the basic concepts using program logic models. If you want to go deeper in your exploration of logic models, please see the NYFA SpiderSchool urls listed at the end of the list.

Good Places To Start

An introduction to **Program Logic Models** by Sharon Kirkpatrick provides the basic what, why, and how of using this tool for evaluation.
http://www.charityvillage.com/charityvillage/research/rstrat3.html

National Endowment for the Arts Outcome-Based Evaluation
A Working Model for Arts Learning Projects
http://www.arts.gov/guide/out/index-out.html

Guidelines and Framework for Designing Basic Logic Model
by Carter McNamara, MBA, PhD
http://www.managementhelp.org/np_progs/np_mod/org_frm.htm

Seattle University Not-for-Profit Leadership Program
Outcome-Based Evaluation by By Janet Boguch, M.A.
http://www.mnpl.org/pub/training/5.html

Going Deeper

SpiderSchool has additional resources and specific examples from the arts community using them for technology initiatives. After reading the introductory articles, if you want to go deeper:

SpiderSchool's Evalu ation Resource
(http://www.nyfa.org/spiderschool/workshops/kit_buffalo_01/puzzle_quest/explore_links/evaluation.html)

GOALS What basic goal(s) have you set for this technology initiative?	**ACTIVITIES** What do you do to implement this initiative?	**RESOURCES** What will you need to implement the initiative? (Staff, Funding, Space, Time, Materials, etc.)	**CHANGES** What will change as a result of your efforts? What will be the ultimate impacts of the initiative?	**RESULTS** What are some concrete (measurable) 'results' of the initiative?
Description:				<u>Short-term (6 months - 1 year)</u> <u>Longer-term (1 year +)</u>

LOGIC MODEL:
Adapted from Outcome-Based Evaluation Models developed by the United Way.

Overview of Research Methods

Introduction

At the heart of a good technology planning process is a research. A good technology planning process generates many good questions, some answers, and more questions.

It is important to have as much clarity about what information you need to collect and why. What information will be useful for short-term versus long-term decisions? What are the right questions to ask? How can we be as focused and efficient with our information gathering process. It is also important that your research is linked to your key priorities and that what you learn from research helps you craft specific action steps. It is important to be flexible so you can identify realistic goals. Research and information gathering may include all or some of the following types.

External Research	Lessons Learned/Possibilities Research: Phone or email interviews with similar nonprofit organizations and for-profits
Technology Learning	Internet/Vendor research to learn more about possibilities Research specific technology tools/solutions Learning about the technology itself and being an educated consumer.

External Research

External research includes conducting lessons learned research with other similar organizations undertaking similar technology initiatives.

Lessons Learned/Possibilities research gathers information on the way other organizations have used a particular technology in a similar initiative or program. You might look at similar and sometimes dissimilar nonprofit organizations (budget size and mission) or for-profit entities to learn about their planning and implementation process. To design lessons learned research, your Tech Team should brainstorm a list of organizations that you wish to research and potentially interview. You then will need to specify the questions that you think are important to research. Once you have the results of your research in hand you can analyze the results, and discuss the implications for your technology plan.

- ***Site Visit***: The interview would be conducted face-to-face at the organization. Going on-site also gives you the opportunity to see first-hand any demonstrations of the organization's technology. A face-to-face interview would yield more in-depth information to actually "see" the technology at work.

- ***Phone Interviews***: Obviously, conducting site visits might get to be expensive if organizations were located in other regions of the country. A second option is to set up a phone interview with a representative or several representatives from the organization. It may take several phone calls to identify the right people to interview.

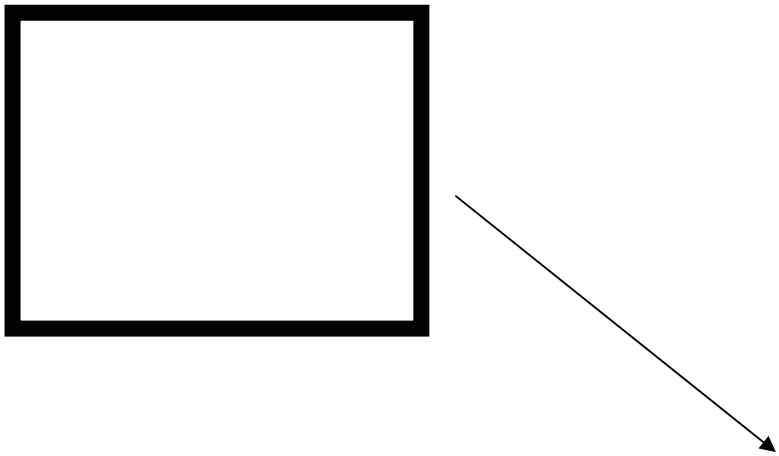
- ***Surveys***: You could also send out a survey to organizations. Email surveys are very efficient. Web-based survey tools such as Zoomerang or SurveyMonkey make the task easy and inexpensive.

- ***Web Research***: A useful approach for collecting information about other nonprofit organization's web sites is to use "critical browsing." That is, review the organization's Web site and take notes on what content is present or not. For more information on "critical browsing," please refer to SpiderSchool (http://www.artswire.org/spiderschool)

Designing Lessons Learned Research

Step 1: Decide Who To Interview

Brainstorm a list of nonprofit arts organizations that do similar work and have the same budget size. Includes organizations in your local area as well as from other regions.



Think outside the box: Brainstorm a list of for-profit or other types of nonprofit organizations that have undertaken similar technology initiatives.

Step 2: Figure out what questions you need to ask?

Here is a list of categories. Brainstorm a list of questions that are related to your technology planning issues.

1. Staffing
2. Training
3. Internal Information Systems (Databases)
4. Local Area Network
5. Phone System
6. Web Site
7. Internet Access
8. Financial

3. Decide how you will collect the information

Select how you want to collect information for your environmental scan. You may use one or several collection methods. Identify who will responsible for collecting information and schedule for implementation.

On-Site Visit
Phone Interview
Survey
Web Research

4. Synthesize the findings & discuss with your Team

Technology Learning
Instant Knowledge Guides

It is important not to shy away from the technical side of your technology plan. While you will be working with a team of consultants, your technology team and key organizational leaders should embrace technology and try to understand it from a policy standpoint. By no means do we expect you to become a certified technology specialist in all areas (which, by the way is probably an impossible task), but it is important to gain a conceptual understanding of the technical areas that are vital to on reaching your organization's tech plan goals. If your organization does not develop basic knowledge about the technology, the implementation of your plan will most certainly suffer.

Give everyone on the team permission to learn about technology as part of the process. Throughout the KIT technology planning process, it is a good idea to allocate some time to learning more about the particular technology tools or solutions that you are planning to purchase or use as part of your plan. Keep in mind that you can learn lots from interviewing technical consultants or vendors as part of a purchase decision.

To assist you with the technology learning process, we prepared a collection of "Instant Knowledge Guides" on the topics your team is most likely to need to know. These guides represent a synthesis of the knowledge gained by KIT participants to date as well as mining other resources.

Relax, you don't know to know every topic on the list! These are offered like a buffet, simply pick and choose what you need to know to enhance your planning efforts. We have provided brief definitions, worksheets, tips as well as URLS for articles and web resources if want to pursue the topic in more depth.

Database Primer

A database is a collection of information organized in a way to make it accessible and usable for an organization to deliver programs or manage operations. Database software is computer instructions that enables us to sort, organize, find, and present data. Different types of software include: "home-brewed" (MS Access), "pre-packaged applications" (software designed for a specific non-profit function) and an emerging category called "ASP" or web-based subscription software.

Types of Nonprofit Databases

- Contact/Client
- Fundraising/Donations
- Ticket or Other Sales
- Information/Referral
- Sales
- Events
- Volunteer

Talk the Database Talk

Table: Contains all the raw data in an information system. It looks like a spreadsheet.

Fields: Category of information in a table. If you think of a table as a grid, the field is a column. Fields can exist as different data types: text, number, auto number, yes/no, etc.

Field Label: A describes the data the field is collecting. For example, the "First Name" field is collecting first names.

Record: If you think of a table as a grid, a record is a single row. A record is a collection of fields that describes a person or thing in the database.

Output: How the data will be presented or used, includes reports, lists, merged letters, publication pages, HTML documents, customized receipts, membership cards, etc. You have to think about what fields you want, how they should be sorted, and preferred layout.

Query: A question about the data in one or more of the tables of your database. Queries make lists, count records, and make calculations based on the data.

Flat Database: All the data is lumped together into a single table or spread sheet. You may have redundant data. Simple and easy to build, but may not be efficient.

Relational Database: Data is stored in a collection of tables and is linked with a common or key data field. Requires a knowledge of the your database program to set up and run reports.

Conceptualizing a Database Design

By Manny Rodriguez [mannyr@telocity.com]
KIT Technical Consultant

Designing and implementing a relational database requires a bit of insight about your organization from both a micro and macro perspective. It is important to be able to conceptualize a design that will satisfy the administrative operations of the organization. The following steps will assist in "thinking through" a design for your database project.

If you are planning to create your own database, whether on your own or with professional help, here are several key elements to consider before designing a relational database:

1) **Talk isn't Cheap** – To realize a database system is to understand the underpinnings of your organization. Meet and talk with anyone that has a firm understanding of your organization's administrative foundation. Get to know as much as possible about how data is collected and how information is disseminated.
2) **Writing is Cheap** – Begin by writing down a wish list of items you want to see recorded in your database. Do not limit yourself to any number of items. Just write! Use a grid with at least three columns to list your items, details, and descriptions.
3) **Output your Input** – Determine what kinds of data you will need to extract from your database: labels, Board list, list of annual contributors, etc. If you are currently using a manual system use your existing reports and forms as a point of reference
4) **Set your Tables** – On a separate piece of paper or graph paper, determine the tables based on information collected from item 1.
5) **Play the Field** – once you have determined your tables, make a list of fields that each table will contain. Select which field will be your key field. A key field is a field in your table that will be unique for each record. Ex.: ContactID
6) **Normal is Relative** – Normalize your fields by determining how many subdivision those fields will have. Example: Name field can be further normalized by creating two separate fields such as FirstName and LastName.
7) **Relations are Normal** – Again, on a piece of paper, draft out what tables should be "talking" to each other. These are known as relationships. Start by drawing each table separately with their field elements, identifying each table's key field (primary key) then making the connection. Only those tables that depend on each other for data should be considered for a relationship.
8) **Shape your Forms** – Envision what your screen view will be for each data entry table. Forms are just another way to view the tables you have created. Draft out on paper how and where you would like to see the data entry fields placed.
9) **Question your Query** – Determine how your data will be extracted. Write down questions about your data in the following manner: How many members in my database will expire their membership this month? Who will be attending the event of 1/12/02?
10) **Report your Data** – after completing a draft of all of the above, design a report (using an application such a Word, Excel, or just a pencil and paper)

that contains data from your tables based on your query. This process should output your original output data desired from #3.

By no means is this a complete guide to database design. However, organizing your information with the above steps can help you better conceptualize your database project. Attached is a sample design draft and database schema for a contact/registration database. Given your specific need, each design will have its own set of definitions, and structure. This model is simply to show how you can start thinking about the construction of your database design. It is not a completed schema with all its necessary components.

Sample Database Design Draft

Objective

- Organize contact data for artists, arts organization, and constituents
- Upgrade current card system
- Secure information
- Generate regular reports for membership renewals, artist by discipline, legislative contacts
- Data accessibility for staff

List your Items (Entities)	What Details are in Each Item (Elements)	Describe their Functions
Contact	Name, Address, Org, Title, Category, Phone, Fax	This will collect all contact data for our artists, members, associate organizations, etc.
Contact Category	Category	List of categories that will separate database content. Categories: Artists, Members, Funders, Legislators, Vendors, Volunteers, Audience
Event Attendees	Name, Address, Org, Title, Category, Phone, Fax, Event, Time, Date	Table of event attendees containing event data
Registration	Date of Registration, Fee Schedule, Time, Location	Record of who registered for what event.
Event	Event Name, Type, Location, Time, Date, Available Space, Description	Detail description of event, time, location, seats available for this event and description.
Payment	Mode of Payment, Date Paid, Pending Payment	Record method of payment, date paid and payments that are pending.
Mailing Labels	Name, Title, Org, Address	Mailing labels for publications, press release, solicitations, etc.
Database List by Category	Name, Address, Org, Title,	List on demand of people

	Category, Phone, Fax	or organizations based on predefined categories (Artists, Members, Funders, etc.)
List of Event Attendees	Name, Address, Org, Title, Category, Phone, Fax	List of participants attending an event

Database Options: Build, Buy or Rent?

You will most likely be taking a critical look at your organization's existing database and how well it serves your needs. Researching, designing, and evaluating database software may very well be the main activity of your technology planning process. This fact sheet looks at the various options.

Before you begin, you must first decide whether you will be fixing or replacing your current database. If you have no option but to replace your current system, you also need to have a basic understanding of the three basic choices: build, buy, or rent.

Fix or Replace

- Decision based on an assessment of existing and future information needs.
- If your database lives on an ancient platform, is a manual system or is a spreadsheet, you will be replacing it.
- If your existing software can't survive a hardware upgrade, you'll be replacing it.
- If it lacks vital features or you are plagued by performance issues, you'll be replacing it.

Understanding The Options

It isn't about selecting the perfect database software package, its figuring out which software approach is the best fit for your organization's needs. The emphasis should be on how your organization uses information, not the specific tool. Planning & research time for each option is about the same, although development and implementation time and costs may vary according to complexity.

Build: You use a generic database software program such as MS Access or FileMaker Pro to create a "home-brewed" database. You may be designing and building from scratch or modifying a template (**ebase**). This option requires a good design, focused scope of work, staff and leadership input, getting over the learning curve, investment in training, and a generous timeframe.

Pros

- *Customized*
- *Basic Training in using product is widely available*
- *Smaller cash upfront investment required*
- *Good for small organizations or very simple projects*
- *Good support is widely available if common package*

Cons

- *Requires high staff involvement, good design skills*
- *Dependency on a single staff if training/documentation is not provided*
- *True cost is often underestimated*
- *Requires leadership involvement and education*
- *Need to allocate staff time and database expertise*

Buy: A pre-packaged database software application that is designed for a particular nonprofit function. This might include fundraising software, information and referral,

contact databases, client management systems, and others. The **Nonprofit Software Index** (http://www.npinfotech.org/tnopsi/) lists many packages. The cost ranges from under $1K to over million. Typically first year costs 10-20K.

Pros

- *Don't have to design from scratch*
- *Training and documentation available*
- *Upgrades are available regularly*
- *Good support is available although it may cost additional*

Cons

- *Big financial risk if needs and packages are not carefully assessed*
- *Training and support can be expensive*
- *You may need additional customization or purchase more than one program*
- *Defines platform, not all work on PC and MAC*

Rent: Renting or outsourcing means that you are essentially renting a customized database application from an outside vendor (ASP) over the Internet, instead of doing the programming work in-house. You still need to think about design. If contracting with an ASP, your organization can use the software without having to purchase, install, support or upgrade. ASPs that specially serve nonprofits are a growing trend in the nonprofit sector. The Nonprofit Matrix (http://www.nonprofitmatrix.com/index.asp) provides listings and reviews.

Pros

- *Timeframe can be condensed*
- *Documentation and support provided*
- *Don't need the database programming expertise in-house*
- *Not locked into one platform*
- *Don't have to upgrade software*
- *Other software may be integrated*

Cons

- *Staff must have online access, ideally high speed*
- *Expensive and provides more or less options than you may need*
- *May be difficult to add features*
- *Requires time to integrate and not all vendors have design assistance*
- *Big financial risk if you don't select the right vendor or analyze needs*

Additional Resources:

Techsoup: Voices from the Field. Database articles from 10 nonprofit experts. (http://www.techsoup.org/articlepage.cfm?ArticleId=379&topicid=6)

Ticketing Systems

You can find a complete list of ticketing software vendors (http://www.ticketlife.com/mbr/linkssoftware.html), although most ticketing system software is geared for larger organizations with larger budgets. While there are a few programs in use by smaller organizations with smaller needs, many look towards the "building their own" option based on Access or FileMaker Pro or an ASP.

Resource Web Sites

Arts Research & Ticketing Services
(http://www.artsoz.com.au/)

TicketLife
(http://www.ticketlife.com/)

Software/Vendors

Choice Ticketing (www.choiceticketing.com)
CyberSeats (http://www.cyberseats.com/)
Tickets (http://www.tickets.com/)
EasePro Software

SOFTWARE

Software is often divided into two categories: systems software and applications software. Systems software provides the utilities for the computer to run such as Windows 2000 or Windows XP. Application software includes programs that do the work, including spreadsheets, databases, and web editors. Another emerging category is "**ASP**" or application service providers which is web-based software.

After you have identified your technology planning goals, you will most likely encounter several issues as related to software. These are:

What software is best for our needs?
How can we ensure that we have consistent versions of software and that all our software is legally licensed?

The technical specialist will work with you closely to help you determine whether you need to upgrade your operating software and in the selection of specific software. They will also guide to you appropriate vendors.

Resources

TechSoup: Software Simplified
http://www.techsoup.org/articlepage.cfm?ArticleId=139&topicid=2

TechSoup: Choosing Software That Meets Your Needs
http://www.techsoup.org/articlepage.cfm?ArticleId=35&topicid=2

TechSoup: Making Sense of Software Licensing
http://www.techsoup.org/articlepage.cfm?ArticleId=140&topicid=2

OneNorthWest: Obtaining Donated Software
http://www.onenw.org/toolkit/donation.html

Fundraising Software: Fact Sheet

Fundraising software programs are essentially databases that support fundraising activities. You have three general options:

- Purchase "off the shelf" software especially designed for fundraising activities
- Build your own fundraising database using FileMakerPro or Access or free templates such as Ebase
- Rent the software using the "Application Service Provider" model which runs the software via the Internet.

Selecting the right option for your organization is a highly subjective process - it has to be the right fit for how your organization carries out fundraising activities, compatible with other software/information systems.

There is a wide range of **off-the-shelf** software choices available to nonprofit organizations, ranging from free to $1,500.00 to over $10,000.00. Most websites of software developers do a good job of describing their product's features, but it is useful to understand the pricing differences.

The bare minimum of "fundraising software" is a flat database with a few pre-programmed fields and report functions, which you could very likely cook up on your own. These programs do not sell for much. More expensive packages may come with dozens of reports, integrated accounting functions, supplement units, relational power, merge options, network and multiple-user potential, and technical support and training modules.

The two largest price breaks have to do with the degree to which advanced accounting software is bundled into the package (some companies advertise their products as "fundraising and accounting software", just to let you know in advance what's available) and the software's networkability and user capacity. So make sure that these are the kinds of questions you answer right away:

- How will this work with my accounting software?
- Do I want to replace my accounting software too?
- How many people will be using this program?
- And how large a network?

The first step in the decision-making process is to do a rigorous analysis of your fundraising needs. You will need to evaluate both your current fundraising strategies and how those strategies are likely to grow and change. There is very likely going to be a close relationship between the size of your development program, your budget and the amount of money you have available to spend. Software options regularly conform to these facts, and obviously, the more expensive options are designed to address the needs of larger and more complex operations.

Most likely, you will be looking at the middle or lower end of the range which offers networkability and -- most practically -- a wide array of sorting, reporting and tracking functions. The best of these programs include greatly numerous pre-formatted functions, and allow you to distribute your data into other software programs and import from them as well. Some will include functions that make other

software utilities redundant, by including functions that do the work of those programs as they relate to the database. And many of them offer specialized supplements (for special events, annual campaigns, joint projects et al.) that will assist you in your efforts to customize the package to reflect your idiosyncratic development needs.

The very basic fundraising software programs are barely-adorned versions of flat database programs as described above. They can index and sort for you, but most probably cannot offer a wide variety of report functions or allow you to import new modes of data management. Nonetheless, certain pre-formatted features in even the simplest databases can save you lots of time, especially if you have a sharply limited budget and must wear most of the hats in your office. If you are looking for a bare-bones approach, EBASE (a template for FileMakerPro) may be a good option.

Questions To Ask About Software

Many software companies offer demos that are either downloadable from their web site or available by request. While you should certainly avail yourself of this option, bear in mind that a disordered review of thirty different software demos is going to keep you busy for the next several years. Once you've used the pre-planning checklist to eliminate some options, pick a handful of demos use the following list to compare the functionality of each.

- How does their software's features meet your specific program management needs?
- How does it conform to your program structure (does it work the way you work?) or does it force you to conform to its structure?
- Is it compatible with existing hardware/Internet connection?
- Does the manufacturer help configure or otherwise set-up the software to reflect how your program operates?
- How does it look on the screen? Do the screens appear overly busy or complex? Is it easy on your eyes? Can you adjust for color, shading, contrast, etc.?
- How many options can you use to tag or otherwise "code" a constituent?
- How are gifts/grants, pledges, and pledge payments recorded?
- How does the software handle importing of new records and/or data elements (e.g., phone numbers or zip+4 codes) from other sources? In what formats?
- How does it handle exporting data? In what formats?
- How are yearly program revenues tracked and reported?
- How are appeals and solicitation programs managed?
- How are grants tracked and reported?
- How does the report generator work?
- How does the mail merge work?
- How do you search the database using multiple criteria?
- How do you index or otherwise segment a group of constituents?
- How easily can it integrate with online fundraising efforts?
- How are special events managed and reported?
- How long has the company been in business?
- How many installations have they made in similar type/size organizations?
- Do they have any installations locally you can visit?

- What would be the total cost for your installation (adding software purchase price including costs for all necessary user-licenses, data conversion, annual technical support, and initial staff training)?
- What are their options for additional staff training?
- How does their technical support work? What is the average telephone wait time? Can you get help via e-mail or fax?

Other Considerations

Many software companies have testimonials from satisfied users on their website. Read these testimonials, but keep in mind that no software company is going to promote a negative review of its own product. Sometimes the testimonials will include links to the nonprofit itself; feel free to contact those nonprofits and ask them further questions. In any case, be sure to survey at least two other organizations of your approximate scope that have purchased the software you are considering. (The KIT Listserv is a great place to pose these questions). Their experience can be quite educational. The following is a list of questions to ask of these other nonprofits.

- What are the software program's strengths?
- What are its software program's weaknesses?
- How long have you had the program?
- Do you like the program?
- Does it do everything you need it to do?
- Did you look at other programs?
- Would you buy it again?
- How was the staff training?
- How did the data conversion go?
- How is the Technical Support?

Fundraising Software Considered By Other KIT Participants

The following fundraising software solutions are the most frequently explored choices by other KIT participants. These are, by no means, the only options. It is most important to find the right fit, based on a thorough exploration of the software's features and your organization's needs. A complete list of Fundraising Software Packages for Nonprofit Organizations can be found at the Nonprofit Software Index (http://www.npinfotech.org/TNOPSI/fundrais/frindex.htm)

1. Commercial Software Packages

DonorPerfect (http://www.donorperfect.com/)
JSI Paradigm (http://frs.jsi.com/)
GiftMaker (http://www.campagne.com/gmpro.html)
Results/Plus (http://rp.metafile.com/)

2. ASP Model

Etapestry (http://www.etapestry.com/)
DonorIT (http://www.socialecology.com/products/dl/)

3. Templates based on commercial database software

Ebase (http://www.ebase.org) (FileMakerPro)

Financial Software: Fact Sheet

Accurate financial information is essential for responsible financial management of a nonprofit organization. Having the right accounting software package can help make managing your organization's money less cumbersome and more efficient.

As part of the selection process, you need to evaluate how well your current system is working and whether you need to make a change:

Does your organization have a person on staff doing your accounting? If so, is your accounting system computerized?
If you outsource your accounting needs, do you need to track financial information internally and generate reports? If so, is your current system efficient?
If the system is not computerized, do you think it should be? Why?
What accounting functions does your organization perform on a regular basis?
What information is requested by your accountants and in what format?
Does your current system comply with current NPO accounting standards (fund accounting, reporting across fiscal years, cost allocation, capability with fundraising activities, encumbrance accounting, and industry standards (FASB)?
Does the current system comply with government grantee reporting requirements and enables you to efficiently produce reports?
Can your current software or system efficiently produce timely internal and external reports without excessive re-formatting, re-creation or manual entering of data?
Do you need fundraising software, fund accounting software, or both. If you need both, do they need to be connected? Why?

What kind(s) of accounting software does your organization use?
Would your accounting system be adequate with a 25% increase in volume?
Do your computers run the accounting software adequately?
Does your organization need to upgrade to a newer version of your current program or even a different program? If so, what program do you need?

Software Evaluation Questions

- How user-friendly is the software?
- Is additional training and technical support needed to use it?
- Will be run from a network and will more than one user need to access it?
- Is the software compatible with your existing hardware?
  Do you have fast enough Internet access that using an ASP (Application Service Provider) could be a viable solution for your organization?
- Is it compatible with other business software such as membership, class registration, fundraising?
- How flexible is the package in customizing reporting needs?
- What is the full cost of the software? (license, training, and technical support?)

After you consider these issues, the next step is to evaluate software products available from vendors. Demonstrations help to provide a better understanding of the products and may inform you of beneficial features that you had not considered.

As with other software evaluations, it is also important to get feedback from current users (again, the KIT Listserv is an efficient way to gather this information).

Financial Software Packages

The following list identifies software packages explored and in use by many of the KIT participants. These is not a complete list of options. For a list of nonprofit software available, see:

Finding Accounting Software
(http://www.findaccountingsoftware.com/)

Nonprofit Software Index/Financial Software
(http://www.npinfotech.org/tnopsi/finance/fnindex.htm)

QuickBooks (www.quickbooks.com): QuickBooks is a popular, inexpensive, and easy-to-use commercial software program used by many small nonprofit arts organizations. NonprofitBooks (http://www.nonprofitbooks.com/) is an accounting software package that leverages the power of QuickBooks®* to create an easy-to-use, comprehensive accounting solution, designed specifically for nonprofit organizations. that works with QuickBooks.

It is important to note that MAC version is not as flexible and detailed as the PC version and the manufacturer does not regularly update the MACINTOSH version. If your organization is committed to keeping its financial management and other business software on the MacIntosh platform, you may want to look at MYOB or Multi-Ledger.

You may need some advice or assistance from your accountant on how you can best adapt these programs to nonprofit accounting requirements. The Nonprofit Financial Center (www.nonprofitfinancial.org) offers instructions. James Lee (JamesL@compasspoint.org), who developed the training curriculum for Quick Books/Excel at CompassPoint, nonprofit technology assistance program in California notes, "It is very important to know how to correctly setup for-profit accounting software to handle restricted net assets (necessary if your organization receives any restricted grants). I developed the QuickBooks/Excel curriculum at CompassPoint (http://www.compasspoint.org/) and would be glad to share info if you need it."

MYOB: Minding Your Own Business (http://www.myob.com/us/) This competitor to QuickBooks is also fairly easy to set up and use. The MAC version is an attractive option for Mac users.

MultiLedger (http://www.multiledger.com/). In the same category as QuickBooks, the Mac is an attractive option for MAC Users. It also comes with an easy-to-use, integrated payroll module.

Netledger (http://www.netledger.com) is an ASP option, an inexpensive online accounting service.

Hardware

Hardware refers to computer objects that you can actually touch, like disks, disk drives, display screens, keyboards, printers, boards, and chips. Or simply put the boxes and wires.

While you may not need to know how to take your computer apart or put it back together, you should at minimum become familiar with the terms and functions of each of the major parts of a computer system. If you're not sure whether it is a modem or microwave, here's a fun way to learn ! (http://www.quia.com/jg/65620.html)

The technical specialist will help your organization evaluate existing hardware and identify new hardware that is needed to reach your future goals. Keeping your organization's technology investment in good shape means keeping good records about your computer and hardware. As part of the technology planning process, you have already gathered a lot of details about your hardware and software, including versions, brands, and vendors. It is a good idea to keep that information in a notebook or database and anytime that you add something to a computer, update the information. This will make it easier for anyone who is hired to do regular maintenance of your equipment. Just like a good car mechanic, a good computer consultant can help you with diagnosing a problem if they know the history and you've clearly communicated the problem.

Printers, computers, modems, and monitors have been become essential tools for nonprofit organizations. However, they don't last forever! Hardware must be treated as consumable expenses like office supplies. They will need to be replaced every 2-3 years. Inefficient hardware not only wastes your organization's productivity, but it also affects morale. Many organizations replace hardware on a staggered basis, so that roughly one-third of workstations are being replaced every year. This strategy will keep costs incremental and avoids weakening infrastructure.

For rough budgeting purposes, plan on allocating approximately $1,000-1,500 for office workstations and $2,000-$3,000 for graphics/production workstations. This cost includes the hardware, software, licenses, maintenance, and warranties. When making a purchase, don't forget to take advantage of your tax exempt status. Be sure to inquire about nonprofit discounts and/or "educational pricing" when making a purchase. To get educational pricing, you do not necessarily have to be a school. Usually a solid educational component within the organization will suffice.

Many organizations ask if they should lease versus purchase equipment outright. Leasing is an attractive option if you do not have the cash outright. However, if you do the math, interest rates on leasing are quite higher than a bank loan. Many also ask which vendor? There is advantage is staying with one vendor once you are happy with their service and products. The reputable national vendors such as Dell, Gateway, Compaq, and Micron are probably safe bets in the event that anything goes wrong with the equipment and it needs to be returned.

Most new computers come with a warranty. Make sure the warranty is a three-year warranty or for the life of the computer. It should cover all shipping costs and labor. In addition, you can also pay additional for on-site support and loaner programs.

These can be life savers for small organizations that may not have a staff person or volunteer who has expertise as a computer mechanic.

You will also need to have a strategy for ongoing maintenance. One option is having a computer "mechanic" who can be at your office in that day in the event of a hardware failure. You can hire a computer mechanic to do regular check ups and routine maintenance on-site. It is important to take the time to find a good computer consultant and develop a relationship. Finding a good computer consultant is like finding a good car mechanic. Word of mouth referrals from colleagues and friends are great a source.

Your planning tasks related to hardware will be:

- Inventory existing hardware to determine what is obsolete and identify a replacement schedule
- Determine what hardware is needed to do your organization's work
- Researching hardware options and prices with vendors and on the Web.
- Determining a regular maintenance schedule

Resources

TechSoup: An Introduction to Hardware
http://www.techsoup.org/articlepage.cfm?ArticleId=132&topicid=1

TechSoup: A Simple Guide To Buying Computers
http://www.techsoup.org/articlepage.cfm?ArticleId=27&topicid=1

ZDNet's Desktop Buyer's Guide
http://www.zdnet.com/special/stories/sc/desktops/reviews/0,12492,2652903,00.html

Local Area Network (LAN) Primer

What

A LAN is two or more computers linked to each other by cables that, with some software, enables the people to share information electronically. In addition to sharing information, A LAN enables computer users to share hardware resources such as a printer, modem, Internet connection, or a backup system. The basic components include: cables, network cards, networking software, and a hub.

There are two basic types of Local Area Networks, peer-to-peer and server/client. A peer-to-peer network means that there is no hierarchy among the computers. All of the computers on the network handle security and administration for themselves. The users must make the decisions about who gets access to what. In general, peer-to-peer networks work well for small numbers of workstations (less than 10) and simple needs (need to share files easily; shared Internet connection.). A server/client LAN is used when there is a larger number of users. One computer is a "dedicated server" that responds to the information requests from the other computers.

Why

The reason to set up a local area network is for productivity. You will be able to share information and print documents more easily and faster. It also makes it more efficient to provide desktop Internet access for all work stations.

Resources

OneNorthWest: **LAN Primer**
(http://www.onenw.org/toolkit/lan.html)

TechSoup: **What is Peer-to-Peer Network?**
(http://www.techsoup.org/articlepage.cfm?ArticleId=210&topicid=3)

ComputMentor: **Planning a Local Area Network**
(http://www.compumentor.org/resources/articles/111.html)

Internet Connection Primer

To be successful in today's complex world, nonprofit organizations must be "Online Organizations" What does this mean? According to an article by OneNorthwest, "Seven Characteristics of an Online Organization it is one that has fully integrated online communication (primarily email and the Web) into the way they work and communicate with their membership, colleagues, or the public or the media. Not only should your organization be connected to the Internet, but everyone staff person should have access to the Internet from their desktop computer and an email account. As the Internet becomes more and more essential to conducting your organization's business, high-speed Internet access may become more a basic necessity than a luxury.

Up until a few years ago, a "fast Internet connection" for small and medium nonprofit arts organizations meant a having the fastest modem on the market (56K) and a dial up account. In the last year or two, "always on" connections such as DSL and Cable Modems have proliferated in many areas. "Always on" connections, which are up to 2-10 times faster than a dial up account, make it easier to share Internet connections on a local area network, and have also come down significantly in price. This makes DSL or Cable an affordable option for many nonprofit organizations.

Dial Up Connection: The slowest, but most available option for nonprofit arts organizations. It requires an outside phone line. The prices have generally stabilized at around $20/month for basic dial-up access, and there is enough competition in the market that service is generally pretty good. It's hard to make a really bad ISP choice. However, you can realize a giant leap in productivity if you upgrade to high-speed Internet Access.

TechSoup: What to look for in an dial-up connection
(http://www.techsoup.org/articlepage.cfm?ArticleId=143&topicid=4)

DSL Connection: DSL provides a very fast, always-on connection that takes the "watching paint dry" feeling out of using the Internet. DSL stands for Digital Subscriber Line, a technology that uses the existing copper telephone wires to deliver high-speed data services. DSL comes in different speeds, from 2 to 50 times faster than a dial up connection. There are different pricing plans and packages, from home users to small businesses, ranging $60-$150 per month. (You pay more for a faster speed.) The recommended minimum DSL connection speed for most small nonprofit organizations has download and upload speeds of 384 kbps.

In the last year, there has been a DSL market shake-up, with many cheap and low cost services going out of business. So, choose your provider carefully. Going with a "brand name" national service or local telco option is a safe option, although you may want to query colleagues using DSL about the quality of the service. If you are in a building where you are required to have a business DSL, then going to the local Telco will be the least expensive and safest option.

You'll need a DSL modem/router ($300-500), firewall ($300-500), an Ethernet card in your computer or server ($30-$100), and an Ethernet cable to connect your computer or server to the DSL modem.

OneNorthWest: DSL: Fast, Cheap, and Out of Control
(http://www.onenw.org/toolkit/dsl.html)

DSL Reports
(http://www.dslreports.com/)

Cable Connection: Cable connections you to the Internet through the same line that carries your cable TV service. While Cable is heavily marketed to home users, for many nonprofits that don't have DSL in their neighborhood, Cable can be the best high-speed option. Cable costs runs about $40-60, depending on whether you rent a cable modem from the Cable company or purchase your own ($200-300). In addition, you'll need a router.

TechSoup: Introduction to Cable Connections
http://www.techsoup.org/articlepage.cfm?ArticleId=196&topicid=4

Cable Modems: Portal Site
http://www.cable-modems.org/

Security Issues

The downside to high-speed, always on Internet connections is that your local area network and information may potentially be available to hackers or others who can enter via your always on Internet connection. You can avoid all this by learning a little about security issues and putting some basic protections in place. These include installing a "Firewall," updating security patches for your operation system, and setting sharing permissions appropriately. A firewall will limit access to and from a network; and it will limit access between computers on the same network.

The technical specialist will help you evaluate your current high-speed system or review with what additional purchases and procedures are needed to upgrade to a faster connection. The technical specialist will also conduct a security audit of your current system and make suggestions for implementing protections.

TechSoup: FireWalls and You
(http://www.techsoup.org/articlepage.cfm?ArticleId=90&topicid=3)

Other Issues

If you haven't done so already, be sure to set up email accounts for each staff member. The fact sheet below provides a number of options, including several free and low-cost options for doing so.

OneNorthWest: Providing Email Accounts for all staff members
http://www.onenw.org/toolkit/individual-email.html

Basic Maintenance

1. Back Up

What does it mean?

The definition of "Back Up" in the dictionary means "extra" or "stand by." The example given is "back up pilot." Let's say you were on an airplane with one pilot and that pilot had a heart attack and suddenly died. Would you be in trouble? How could your organization function if everyone's email, word processing documents and contact database were destroyed by virus or catastrophic event? How many hours or days would it take to reconstruct that information?

Why is it important?

Like having a co-pilot, backing up your data regularly is vital insurance against a data disaster. Unfortunately, this is a lesson that most people learn only from a traumatic experience. Developing a solid backup plan requires some investment of time and money, but the cost is far less than the task of recreating data for which no backup exists!

How

There are three different types of data on your computer: operating system, software applications, and data files. One approach is to back up everything on each hard drive. This provides a very high level of security. For smaller offices and machines with smaller hard drives, this isn't too dramatic. However, hard disk sizes (and file sizes) have been mushrooming in recent months, and for larger offices or organizations with lots of data, backing up everything can be an expensive and time-consuming proposition. However, backing up your entire hard disk means that if you ever have a crash, you can restore the entire contents of the drive in one easy process.

A more streamlined approach is to back up data files which may include: email messages, word processor files, databases, web bookmarks, and any other files you directly create will provide you with sufficient backups to make recovery possible in the event of a crash.

It's a good idea to make two sets of backups. Keep one back up available in your office and one that is kept off-site in the event of a disaster. Rotate the backups at least every week, so that you have a recent backup that is protected against fire, theft or some other catastrophic event. Regular off-site backups can help insure you against the loss of irreplaceable data.

Hardware

You can back up data onto diskettes, CD's, or Tape Drives. Software that accompanies these devices can automate the process so you don't need to remember to do it. You will need to choose the option that works best for your organization. A good comparison of the options can be found at: OneNorthwest: (http://www.onenw.org/toolkit/backup.html)

2. Virus Protection

What does it mean?

A program or piece of code that is loaded onto your computer without your knowledge and runs against your wishes. Most viruses can also replicate themselves. All computer viruses are manmade. A simple virus that can make a copy of itself over and over again is relatively easy to produce. Even such a simple virus is dangerous because it will quickly use all available memory and bring the system to a halt. An even more dangerous type of virus is one capable of transmitting itself across networks and bypassing security systems.

Why is it important?

It is important that your organization has installed virus protection software on all its computer and that you download the definitions on a regular basis. Preventing viruses in the first place is much easier than cleaning up an infected system. As your organization uses the email to communicate and share information electronically through an internal network, virus prevention becomes critical. Don't wait until your entire organization is infected with an ugly virus that can delete all your data to learn more about viruses!

How

The two most popular virus protection software programs are Norton's Anti-Virus and MacAfee's Anti-Virus. Both software programs have the ability to automate the virus definition update process which make it convenient for updating your definitions at least every week.

Even if you update your virus definitions diligently, you are not 100% safe. The best way to fight viruses is to take an overlapping, multi-layered approach. Updating your AV definitions is important, but doing so without adopting other defensive strategies won't decrease your overall risk. In addition, you should take the following precautions:

- Check for, and install, any OS and software application patches once a week.
- Run your Web browser and email applications at their highest security levels.
- Forbid the opening of any attachments in email.

Resources

TechSoup's Virus FAQ
http://www.techsoup.org/articlepage.cfm?topicid=5&articleid=280

OneNorthWest: Protecting Your Computer From Viruses
http://www.onenw.org/toolkit/virus.html

Creating a Web Site Re-Design Plan

A solid web site begins with a solid web plan. Whether you are launching your first web site or looking to do a web site make-over, the analysis grid below will help you order the ideas and directions of your web site plan. The grid includes the five main areas of planning:

- Goals
- Intended Audiences
- User Experience
- Functionality
- Content

Goals	**Intended Audience**	**User Experience**	**Functionality**	**Content**
Goal 1	Intended Audience 1	User Experience 1	Functionality 1	Content 1
Goal 2	Intended Audience 2	Intended Audience 2	Functionality 2	Content 2

Once you're ready to sit down and start planning, have conversations within your organization about each of the five areas. And, when you've reached some conclusions and some consensus, sit down together and complete your own grid. Then you'll have the first draft of your web site plan.

Filling out the Grid

Goals

Establishing goals for your web site is the first step in the planning process. The goals will determine which audiences you design your web site for, what content is included, and how the site is structured. Most importantly, good goals are the difference between a web site that helps you meet your organizational priorities and a web site that just takes up your organizational resources. To set the goals for your web site, consider the following:

Your organizational objectives. Your web site can be an important tool to help meet your organizational and program goals. The goals should be specific and quantifiable. Think about what you want your audience to do once you get them to the web site.

150 people request class catalogue from web site
25 people register for a class online
100 people call with inquiries about classes from web site

Identify long-term goals. The long-term goals of your web site are the goals that will be most important in establishing the audiences for, and structure of, your site because they don't change frequently. For example, if your number one long-term

goal for the site is to get 1000 new students over three years, you would want to ensure that you had a form to potential student information that was immediately accessible on the site, and you may put other content further down in the site.

Set short-term goals. While long-term goals will dictate the structure and audiences for your site a majority of the time, there will be instances when you want to use your web site to reach short-term goals. For example, you may want to use your web site strategically during a specific campaign, or during your annual membership drive, in ways that aren't reflected in the long-term goals. So, while you may normally have the student registration forms as the primary focus of the site, you may supplant that form with membership information during your membership drive. Remember that short-term goals will change frequently, so you'll need to revisit this planning process several times a year.

Audience

The next step in the panning process is to determine which audience your web site will address. Your web site can't be all things to all people. It can only serve certain constituencies. You need to identify these constituencies so that you will be able to identify the content, message, and site design that will appeal to the audience and maximize the success of your site. To determine the audiences for your site, you should:

Determine which audience you need to reach to meet each of your goals. For each goal on your worksheet, consider the kind of person that would be most likely to help you meet that goal. You may also decide that you have more than one target audience for each goal.

Keep in mind that, though you will design your site to appeal to these specific audiences, there are other, peripheral audiences that will also use your site. Decision makers, the media, and your opposition will all visit your web site, so you will want to ensure that your site addresses these audiences in some way.

User Experience

Documenting the user experience will help you identify potential problems during the planning process, rather than during the development process, saving you lots of time and money. The user experience is simply a narrative of what interactions your intended audience would have with the web site to help you meet your goal. In creating the narrative, you will be able to identify if the process you envision is too convoluted (too many steps), requires special programming or functionality, or requires technology your audience may not have (like Flash, Acrobat, etc.). You will need to document a user experience for each of your goals and audiences.

To do this:

Describe from User Point of View: Write a narrative of what the user will experience once they arrive at the site, what they will visit, browse, read, or download.

Get feedback. Circulate the narratives and see if they make sense to others. Incorporate this feedback to create even better user experience models.

Identify a user experience for each audience. You may identify multiple audiences for each goal, and those audiences may require different experiences.

Functionality

Once you've identified a user experience for each audience, you need to identify any special technology needs that a developer would need to take into account. This will help the developer accurately estimate the cost of you project. Once these are identified, you may find that the costs to develop the function are too high, and you need to redefine the user experience. To document the functionality you need:
Read through each user experience and look for places where the user needs to do something – like download a file or complete a form. Document how you want that action to be performed. For example, if you want a user to be able to submit a request to volunteer for an event, you might document that you need a form that captures the user name, address, phone number, and email address, then sends the information via email to your volunteer coordinator, and generates a thank-you message to the user.

Remember to account for what happens behind the scenes. It's very easy to document the functionality as it would be perceived from the user's experience, but you also need to account for the functionality from your experience. In other words, in the above example, it would not be enough just to identify that you need a form that capture's the user information. You also need to remember that the information needs to go somewhere, whether it's into a database or in an email that gets sent to you.

Don't worry about trying to describe the functionality in technical language. Explain what you need in plain English. It's your web site developer's job to translate that into "geek speak."

Content

Once you know what you want your web site to do, and who you'll be talking to, you need to identify what you want to say. For each goal and audience, you'll need to identify the content that will help you reach your goals. You may already have a lot of this content on your existing site, or in the form of fact sheets or brochures. You may find though, that you need to create new content. In any case, you should document what content you will need, noting what you have, and what you will need to create.

To help identify content, keep the following in mind:
Use your content strategically. There are a lot of web sites that inundate the user with a plethora of fact sheets, information and white papers. But web site users do not read web sites, they scan material. So you need to focus on supplying only the content that will help your site visitor help you reach your goal.

Consider how you will arrange the content on the site. You will need to determine not only what content will be available to each audience, but how they get to it. A good process for determining how to arrange the content on your site is to make a 3x5 card for each piece of content, then lay them out on the floor or tape them to the wall to see how the pages would work together.

Writing The Plan

The next step in having a complete web site plan is to give the grid some context. You need to create a narrative document that lays out the following in a concise, but meaningful way:

Your organization – What is your mission? Who do you serve?
The Web site's role – Beyond the goals, what is your big-picture vision for how the web site will serve your organization?
Goals of the web site – From the grid. Also include how they relate to your organizational goals.
Audiences – Take the information from the grid and expand. Explain why the audiences are key.
User experience – Use your narratives from the grid.
Functionality – Use your narratives from the grid and expand where necessary.
Content – Identify the types and amount of content you will need on your site, as well as a narrative sketch of how it will (roughly) be organized.

This document may form the basis of an RFP for a web site developer or designer.

Final Advice: Logistical Details

Timeline. Chances are, you're developing this site because you need it for some specific purpose, and you'll need it by a specific date. Figure out what that deadline is, and make sure it's realistic. Clearly articulate this timeline to any developer, and make them stick to it, or your project could get mired down in delay after delay.
Maintenance. Once your site is complete, you're not through. For a web site to work as an effective outreach tool, it has to be dynamic. That means that the content and features will have to change on a regular basis. And that means that you have to plan for regular maintenance. There are a lot of options out there, including cool web tools that will help you manage the process easily in-house, but you'll need to plan for this in advance. Otherwise, you'll spend a lot of time and money on an ineffective tool.

Determine what changes your staff will be responsible versus a consultant. Make sure that staff member is properly trained to maintain the site. You will need to determine if you can host your own site or arrange it through a hosting vendor (the actual physical server that your site is housed on). Some of the criteria for determining this will be cost, bandwidth to the Internet, in-house expertise, and backup capability. You should also evaluate web design consultants. Get recommendations from other nonprofits in your niche or geographic region for hosting and design services.

Budget. Know what you can spend on the development of the site, the maintenance, support and training of staff and plan for the future. Many organizations plunk down a lot of money to build a sophisticated site, but don't budget for maintenance costs or to update the site with new functionality, and the site quickly becomes stale. Once

a year you should also plan to fully evaluate the effectiveness of the site against your organizational goals and make sure the site budget is still adequate.

This fact sheet is adapted from "Web Site Development Process" by Holly Ross from TechRocks.

Additional Web Site Planning Resources

NYFA SpiderSchool (www.artswire.org/spiderschool)
Building Arts Audiences on the Web & Rebuilding the Arts Organization's Web Site

Helping.Org: Building & Planning A Web Site
http://www.helping.org/nonprofit/planning.adp
http://www.helping.org/nonprofit/creating.adp

OneNorthWest: Building An Effective Web Site
http://www.onenw.org/toolkit/webdesign/

Ten Tips for Web Site Planning
http://www.makingthenetwork.org/tools/webguide.htm

Email Strategy

*"**Repeat After Me: Email is more important than your Web site.**" -*
Michael C. Gilbert, The Gilbert Email Manifesto

Introduction

You've spent many hours planning, designing, and building a web site that showcases the successes of your arts organization. After launching the site, you wonder - has it been effective in getting your message to the right people? Not unless you have an email strategy in place!

Study after study has proven that the most frequent online activity is email. That's why it has been dubbed the "**Killer App**." Here's a sampling of findings:

97% of Internet users correspond by email (Yahoo!).
84% of Internet users say they can't live without their email (GVU8).
57% of American business execs rely on email (American Management Association)
59% of adults with access to the Internet send or receive email every day.
30 million people used email in the past 24 hours - including four million who are not regular Internet users (CommerceNet/Nielsen Media Research).

Here's the great disconnect: According to "Disconnected: The First Nonprofit Email Survey by Michael C. Gilbert,"78% of nonprofits do no have an email strategy. Gilbert offers three simple rules on why nonprofit organizations need an email strategy to be successful from the Gilbert Email Manifesto.

- **Rule #1:** Resources spent on email strategies are more valuable than the same resources spent on Web strategies
- **Rule #2:** A Web site built around an email strategy is more valuable than a web site built around itself.
- **Rule #3**: Email oriented thinking will yield better strategic thinking overall.

Developing An Email Strategy: Questions To Ask

Developing and implementing an effective email strategy is a fairly straightforward process. You need to identify your audience, content for email newsletter, a relationship management system, and evaluation criteria.

1. Who

The first step is to identify who you want to communicate with why, how, and when. Take a few minutes to brainstorm a list of your key stakeholder groups and audiences that need to know about your organization's programs and describe why. Describe the type of information that would be most valuable to them. Describe what you want them to do once they receive your information?

2. Content (Email Newsletter)

Content is the specific subject matter or topics that relate to your organization's goals and what your audience wants/needs. You must consider the content, frequency, format, and production as well as how your email newsletter is relates to your web site. To get some ideas about the different types of email newsletters, here's a browsing list:

Information about your organization or its program
ABT Ballet: E-Notes On Point (http://www.abt.org/welcome/index.html)
Project Leap (http://www.leapnyc.org/aboutleap/newsletter/newsletter.html)

To update regular visitors that new content has been added to your site
TechSoup: By The Cup (http://www.techsoup.org/sub_btc.cfm)

In-depth practical information on a topic related to your project's work
DotOrg (http://www.summitcollaborative.com/dot_org.html)
E-Opera Newsletter (http://www.sfopera.org/tickets/eopera.htm)

Brief news items w with links to full articles on the Web site
Foundation Center NewsLetter (http://fdncenter.org/pnd/aboutpnd.html)
NYFA Arts Wire Current (http://www.artswire.org/current)

3. Relationship Management

At this point, you are ready to think about the technology necessary for efficiently gathering email addresses, sending out the email newsletter, list maintenance and responding to people who become interested in your organization and its programs. As you consider each of these options, which one will work best for your organization?

Option	Examples	Issues
Your Email Program	**Create a distribution list and place email addresses in "BCC" line. Can use most any email program**	**Manual maintenance can be a pain if list is large**
Free Listserv	**Yahoo (groups.yahoo.com/) Topica (www.topica.com/)**	**Easy to set up, automates adding/removing names, can add snippet of program code to your web site. List messages have ads at bottem unless you pay fee.**
Fee-Based Listserv	**Sparklist (www.sparklist.com/)**	**You pay a monthly fee, but you don't have to deal with ads or the hassle of downloading your archive if you move the list**

ASP/Other	**DonorIT (www.socialecology.com/) E-Tapestry (www.etapestry.com/)**	**These companies serve nonprofits. Systems are integrated donor management systems, not solely email distribute. Total control, more powerful, but you pay more. For a list of additional ASPs, see Nonprofit Mattrix.** **Business packages include Popmail (www.popmailnetwork.com/) and others, but more expensive.**
Database	**Use a database software application that sort the email addresses of your audiences into different segments. That way you can e-mail a different version of your newsletter to different groups. You can use Microsoft Access, FileMaker Pro. or ebase, a free relationship management application.**	**Requires database skills or training to use efficiently.**

4. Evaluation

It is important to embed some outcomes-based thinking as part of your email strategy. What results do you want to see and how you will measure success? Make a list of outcomes or changes you will see as a result of implementing an email strategy. Identify what evidence will you count or collect to see if you have been successful? You will be most likely be collecting evidence from audience feedback as well as analyzing your web site logs.

Audience Feedback	Things To Track or Count
What has been the response from people receiving the email newsletter? **Is the content valuable?** **Does the content drive them to the site?** **How will you ask for audience feedback? (Online survey?)**	**Web Site Statistics:** **Before/After you send** **Number of people who subscribe/unsubscribe** **Asking people who call or attend events how they heard about it**

Resources

An online version of this information, complete extensive links is available at:
NYFA SpiderSchool (http://www.artswire.org/spiderschool/)

Dot Org Newsletter
(http://www.summitcollaborative.com/dot_org_issue1.html)

Gilbert Email Manifesto & Related Articles
(http://news.gilbert.org)

Web Site Marketing Primer

If you build it, will they come? Not unless you put online marketing principles into practice. The centerpiece of your web site marketing strategy is crafting and deploying an effective email strategy. (This is discussed in detail in the Email Strategy Primer). In addition, integrate online strategies into your overall marketing plan, register your web site at various search engines, and continuously cultivate and track your relationships with web site visitors.

If you are a seasoned marketer, you will no doubt be familiar with most of the tools and techniques described below - news releases, mailing lists, promotional tactics, third-party endorsements, referral marketing, relationship marketing, and so on. Implementing online marketing techniques does require, however, a degree of online computer literacy and ongoing work.

What skills are needed? An online marketing campaign calls for creativity and pre-planning to get organized, skills that you as a marketing person already possess. In addition, you will also need to master your email program to keep your online marketing campaigns on track.

Online Marketing Principles

1: Integrate online and offline marketing strategies

2: Build relationships with visitors via a solid email strategy

3: Register in search engines and get listed in appropriate "portal" sites

4: Track Visitation and Visitor Feedback

Promoting Your Web Site Off-Line

While some of these are obvious, here are some basic tips for promoting your web site:

- Make sure your graphic look is consistent and builds institutional identity
- Include your url in your program book, brochures, business cards, letterhead, ads, press releases. Your Web address should be right next to your fax and phone number on any communication sent from your organization.
- Reference Web site content in your print materials. ("For more information, visit our Web site" or "Sign up for our email newsletter at our web site")
- Place your URL on "giveaway items" such as mouse pads, diskette holders, screen savers, stress balls, sticky notes, or other items that are used in and around computer workstations.
- Integrate your Web-based marketing strategies with your traditional campaigns. Open up a Web site in conjunction with the start of a season campaign, new show, or special anniversary.
- Issue press releases for significant site updates.
- Consider adding a message to your voice mail (on hold) message about your Web site.
- Use your Web site as another recognition opportunity for corporate sponsors.

There are some excellent Web sites that provide detailed tutorials and tips for integrating online/offline marketing:

Guerilla Marketing
http://www.gmarketing.com/

Wilson Web Marketing Center
http://www.wilsonweb.com/webmarket/

Helping.Org's Organize and Advocate
http://www.helping.org/nonprofit/advocacy.adp

Search Engine Registration

According to the GVU WWW User Survey, search Engines are typically one of the primary ways that potential Web visitors will find a Web site. In order to get listed, you will need to fill out and submit a registration form. Expect to wait approximately 4-6 weeks until your site appears in the search engine's database and plan on refreshing the campaign approximately once a year. For a complete list of search engines and detailed advice about how they work in terms of marketing, check out The Search Engine Watch Site (http://searchenginewatch.com/).

If your time for registering with various search engines is limited, begin by visiting on the most popular search engines and directories and manually adding your URL and description. The Search Engine Watch Site lists what it considers to be the major search engines with links and descriptions. You can use this page a jumping off point to visit the search engines to register manually. Next, use one or several of the multiple submission sites for less important search engines.

There are services such as the which lets you register simultaneously at all the popular search engines on the Web in one click. These services offer a very limited freebie so you can check out the service and hopefully purchase some their submission services. Unfortunately, search engines appear to stack these registration requests in a virtual "do later" pile. You will need to also register at individual sites to be safe. Another service, called Did-It (http://www.did-it.com) will automatically check the most popular search engines to see if your Web site has been added, although you may have to pay a fee for more comprehensive reports..

Before you begin your campaign, do some pre-planning to get organized. If you have the information below available in an electronic text file, you can cut and paste it right into the registration form. Also, be sure to keep a record for checking and follow up later on.

Check List for Search Engine Campaign

- Contact/Name/Address
- URL of Web Site
- Title of Web Site
- List of preferences for category listings
- Keywords for Search
- Description of Site (10 words)

- Description of Site (25 words)
- Description of Site (50 words)
- Date Submitted

Search Engine Marketing Tips

1: Have links to back top page or site map
A search engine may display the sub-pages of your site before it presents the welcome page. Be sure to include links back to the top or a site map on every page. Otherwise, a potential visitor may be trapped in one of these sub pages.

2: Pick your keywords carefully
Some search engines use the META tags that allow you – as the Web developer -- to select keywords. Choose keywords that you think users may enter to find you (see example below). Since the META tags are on the .html files, they can be edited easily. One strategy is to ask people who contact you what keywords they used to locate you and incorporate those words into your META tags. The article "The Ultimate Keyword Optimization Guide for Search Engine Positioning" (http://sellitontheweb.com/ezine/opinion032.shtml)
provides an excellent step-by-step approach. Check out SearchEngineWatch for detailed explanations of how META tags work, which search engines use them, and tutorials for creating meta tags.

3: Use HTML text on your Web page
Search engines use different methods to find Web pages. Some chug through the html text on your page, but the ALT text to the image extension. If your top page includes text that is graphically rendered, be sure to also include descriptive HTML text.

4: Craft the <TITLE> carefully
Some search engines use the text between the <TITLE> tags when tabulating results. Be sure your keywords are included. In addition, some search engines display the title text in their results, so keep this mind as you title your pages. Be descriptive. "NJ Theatre Group: The Most Comprehensive NJ Theatre Guide on the Web" will attract more clicks than "Our Home Page."

Many web surfers begin their entry to using the Web via portal sites such as Yahoo or may seek out information from arts-focused portals. Make sure your organization is listed in all the various Portal directories.

Tracking Visitation and Getting Feedback

It is essential to regularly collect feedback from web site visitors about their visitation experience and analyze the web site logs to understand their visitation habits. Just as important is to use the information make incremental improvements of your site on an ongoing basis.

There are a couple ways to collect feedback from visitors. A formal method is to conduct an online survey. Zoomerang (www.zoomerang.com) and SurveyMonkey (www.surveymonkey.com) offer free and lowcost services to survey people online very easily. Be sure to add the link to this survey in a noticeable place and incentive to fill it out.

The questions will probably be very similar to those asked on a visitor survey a museum might do to evaluate a particular exhibit or a performing arts organization to evaluate its customer service. Design the survey so it answers the following questions:

- How does our Web site communicate our organization's image?
- What do visitors perceive as the most valuable content area and how can we enhance those areas?
- What do visitors perceive as the least valuable content area? Do visitors know where to find the content that is relevant to them, and is it organized by their needs?
- Did they subscribe to our organization's email newsletter? Have they visited the site as a result of receiving a copy of the newsletter?
- Will they be motivated return regularly? What would encourage them to do so? What would motivate them to share the web site url with a friend?
- How were they referred to our site - online or offline resource?

To avoid having a visitor survey that includes too many questions, check your site's tracking program to see what information can be obtained from your log files. Most tracking programs should have the ability to track browser type, link they followed to arrive at your site, platform, pages visited and other information. If you've been collecting monthly reports, you should also run a year-to-date report.

One of the more popular web tracking software program is Webtrends. It analyzes web site statistics and can automatically produce useful reports. Some Web hosts provide tracking programs, such as "Wusage" as part of their service.

- What pages do people visit most often?
- How are they referred?
- What has been the trend of daily, weekly hits?
- Can you attribute particular spikes in hits to offline/online marketing?

Keep a log of unsolicited comments from visitors and do a regular content analysis of these comments. This should give you some clues as to what information may or may not be clearly organized on your site or some problem areas. One of the most-quoted statistics indicates that, for every complaint you actually get, several hundred people had the same complaint didn't bother to let you know about it. It seems likely to be true with Web pages. So, don't treat a complaint as one isolated user; assume that a lot of other users are having the same problem, but are too busy to do that part of your job -- and it *is* your job to make sure your page stays functional. Think about why those people are complaining and try to address it.

For more details about how to tracking web site visitation patterns and feedback, see Helping.Org's Evaluating Your Web Site (http://www.helping.org/nonprofit/evaluating.adp)

Online Fundraising

What does it mean?

Successful online fundraising is a combination of targeting the right donors who have Internet access with the right pitch so they will be motivated to make a contribution to your organization.

Providing a quick and easy way to accept contributions online via a credit card is a tool that facilitates donations, it does not replace the need for identifying your audience and persuading them to give to your cause. So in addition to an "Internet Presence" strategy, you are looking for the underlying functionality for a donor to enter their contact and credit card information into a secure Web-based donation form, and have that information securely transmitted to you.

There are essentially three different strategies you can use to implement online fundraising:

(1) Online Donation Portal

A donation portal Web site typically provides information about many different nonprofit organizations. Web visitors can select their favorite charity and make a donation online using their credit card. The Donation Portal processes the transaction, acknowledges the gift, and forwards the money along with a report including donor information to the nonprofit organization. The main advantages for nonprofits are that it requires a minimal investment in time, staff, or technology to experiment. Helping.org and Just Give are two of the better known portals, and you find a large list and reviews here.
(http://www.nonprofitmatrix.com/category.asp?Cat=GivingPortal)

(2) Online Fundraising ASP

A fundraising ASP is a vendor who will "rent" you the software to manage the entire back-end of your donations, bank processing, and record-keeping. The first generation of donation ASP services only offered secure web pages where donors could record donation information, including credit card details, which would be passed along to the nonprofit for processing as a regular donation. Many of the online donation ASPs have extended their services to include processing of the credit card information, so that the nonprofit receives a monthly sum deposited to their merchant account, without all of the processing overhead (that's included in the fee or percentage cut taken by the ASP). The latest trend in online donation ASPs has been to add donor analysis and management tools that can perform many of the functions of sophisticated donor management software programs. You find a complete list of vendors and reviews here.
(http://www.nonprofitmatrix.com/category.asp?Cat=Onlinedonations)

(3) Build Your Own

While this option enables your organization to have complete control of the transaction process, it requires a substantial investment of time, money, and expertise. There are two components to building your own donation processing system: 1) The capacity to receive credit card information via a secure Web page

and 2) The capacity to authorize the credit card transaction and deposit it to your bank account based on that information. This approach is best for organization that have a fairly large fundraising effort, have the technology expertise in-house, and have explored and tested different fundraising efforts.

Whatever method you take, you'll need to also think about the legal issues and getting a merchant's account if you don't already have one.

Other Considerations

A number of states have laws that require nonprofits to register as a professional solicitor in order to solicit donations. These laws could apply to online solicitations. You should consult with your own legal advisor as about the need for and how to register your organization. You can learn more details in this FAQ (http://www.nonprofits.org/npofaq/16/21.html)as well as get the most recent update from About.Com. (http://nonprofit.about.com/careers/nonprofit/library/weekly/aa091300a.htm)

If your organization can already handle credit card transactions, you don't need to acquire a merchant account before you launch your online fundraising campaign. If you want to be able to offer your "offline" donors the same convenient payment options as online donations, you will need one. According the OneNorthWest's "Sorting out the Chaos," if your organization is likely to generate at least $100/month in credit card activity, setting up merchant account independent of any online fundraising efforts you undertake should be part of your planning.

Why is it important?

Online fundraising is still in the early stages of development. With new vendors appearing and disappearing and no available "consumer reports" type research, the challenge for development officers is to become knowledgeable consumers. Technologically savvy nonprofit arts organizations that thoughtfully explore the tools will be better positioned to be successful online fundraisers in the future.

Some Specific Solutions

As part of your research, you can post a query to the KIT listserv about about online fundraising. In the past, the following options have been explored or are in use by participants.

Helping.Org
Donate.Net
Paypals
Entango
E-Grants (Tides Foundation)
Local Voice
E-Tapestry

Resources

OneNorthWest: Sorting Out the Chaos
http://www.onenw.org/toolkit/online-donations.html

A Primer on Online Fundraising for Nonprofit Organizations
by Michael Stein
http://www.michaelstein.net/online-fundraising-primer.html

Helping.Org has a collection of links and resources about online fundraising.
http://www.helping.org/nonprofit/fundraising.adp

Npower: Cybergifts, what we've learned, and what is ahead. Presentation by Michael Benecke from Npower.
(http://www.npower.org/Events/NDOAConference/Donations Engines)

Charity Channel: CyberGifts Forum
(http://charitychannel.com/archives/CYBERGIFTS.html)

Other Equipment: Voice, Cell, Palm

Remember when we said that the definition of technology is more than computers? If you have to upgrade your phone system, find cell phone, or want to take the palm pilot plunge, these links are for you!

Voice Mail

NP Genie FAQ (http://search.genie.org/genie/ans_result.lasso?cat=Phone+Systems) about Voice Mail Systems answers all the basic questions and provides excellent planning advice.

Integrated Voice/LAN Networks

Network Design Manual (http://www.networkcomputing.com/netdesign/cti1.html) Computer Telephony for the Enterprise By Michael Sampson is a primer on designing integrated voice/LAN systems. Includes a good introduction.

About.Com (http://compnetworking.about.com/compute/hardware/compnetworking/msubvoice.htm) has a collection of articles on video, voice, and fax.

Palm Pilots/Hand Held Devices

TechSoup: An Introduction to Hand Held Devices (http://www.techsoup.org/articlepage.cfm?ArticleId=146&topicid=1) good introductory article about these little gadgets that are actually quite useful!

Handheld Technology Use in Nonprofit Organizations (http://www.unites.org/html/resource/unites/unites0.htm) examples how these gadgets have been used to carry out programs by nonprofit organizations.

Art created on Palm Pilots (http://www.twice.demon.co.uk/paintings/gallery/palm/palm1.html). The artist, Tom Kemp, has used the application TealPaint on a Palm Vx to produce one thousand small Palm paintings. Each has its place in a huge grid, printed on canvas.

Cell Phones

If you are overwhelmed by the unlimited number of Cell Phone plans, but need to purchase one of your organization, the following web sites can help. These sites are not maintained by cell phone companies, but make their money on a percentage of every sale or partnerships.

Decide (http://www.decide.com/)
Point (http://www.point.com)
CellMania (http://www.cellmania.com/)

Snail Mail

BarCode (http://www.skandata.com/howto.html) FAQ from Skandata provides information about using barcodes to save money in bulk mailings.