Data Management for Non-Profits

Information Technology, The Cloud and Other Useful Things You Should Know

Presentation Outline

I. Introduction to "The Cloud" (David)
   1. Types of Public Cloud Infrastructures
   2. Cloud Security
   3. Data Backups

II. CRM & The Cloud (AJ)
   1. CRM As a Strategy
   2. Cloud-based CRM Options
   3. CRMs and Integration with other CMS Platforms

III. Questions

About Us

David

Founder & CEO of Develop CENTS, an IT Service Provider for Nonprofit Organizations

B.A. in Community Development and AmeriCorps Alum

About Us

Aja "A.J." McClanahan
Owner of Comprehense, Inc.- a database consulting firm working with non-profits and small to mid-market firms to develop custom, cloud-based data management solutions.

What's "The Cloud"?

What it's not…
- A single server or computer
- A mass of computers or data that can't be controlled
- A collection of water molecules that eventually makes water fall out of the sky

What's "The Cloud"?

- Incredibly vague term

- Servers, software & online services

- Incredibly sophisticated network that is highly organized

Public vs. Private Clouds

Public Clouds

- Cloud Service Provider leases its services to multiple customers

Public vs. Private Clouds

Private Clouds

- Managed by your IT Department
- Nothing is shared with external organizations.

Data in a Private Cloud is accessed within your own network

Types of Public Clouds

Infrastructure as a Service ("IaaS")
- Most Basic
- Computing Resources & Internet Connection

Types of Public Clouds

Platform as a Service ("PaaS")
- Same as IaaS, but also includes managed underlying programs (such as the Operating System)
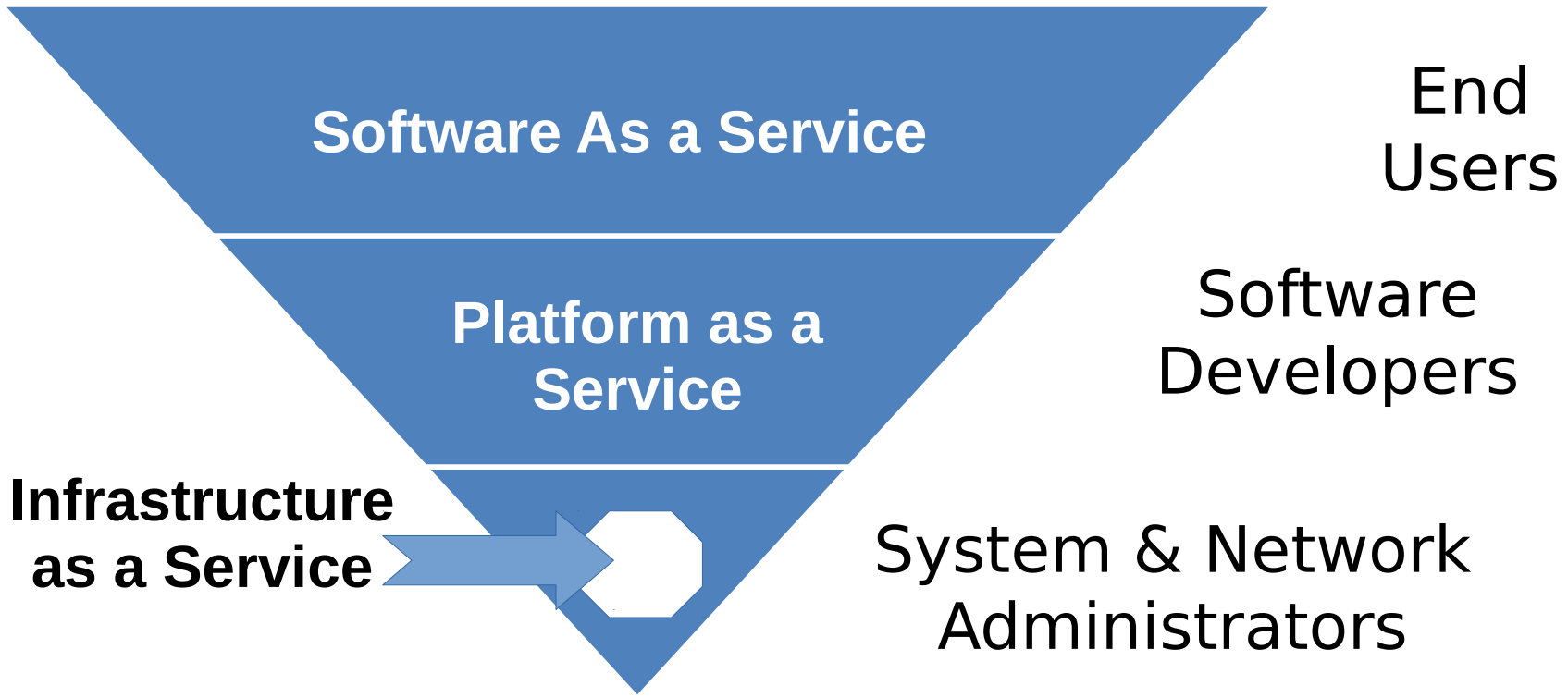
Types of Public Clouds

Software as a Service ("SaaS")
- It's an online service that just "works"

Another Way to Understand SaaS, PaaS, & IaaS

Software As a Service

Platform as a Service

Infrastructure as a Service

End Users

Software Developers

System & Network Administrators

Security & The Cloud

<u>"Normal" Internet Traffic…</u>

- Insecure
- What you do can easily be seen
  - (Recent example: NSA)

Security & The Cloud
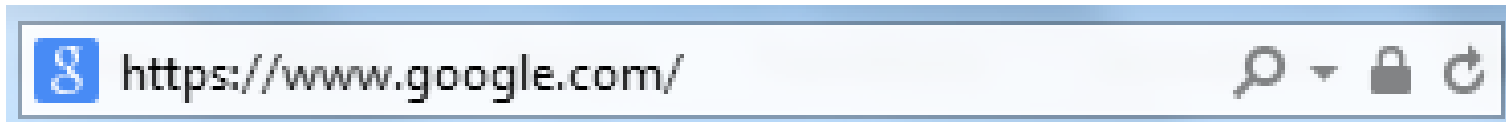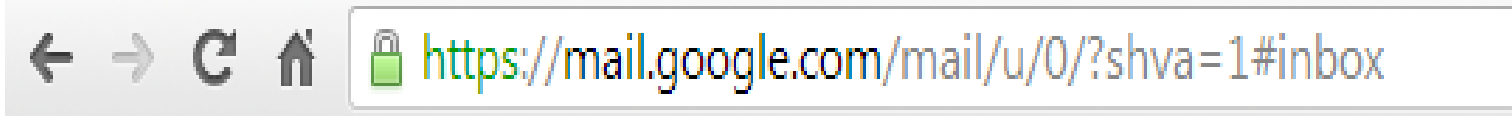
The Cloud is *never* 100% secure.

Examples of Data Breaches...

Security & The Cloud

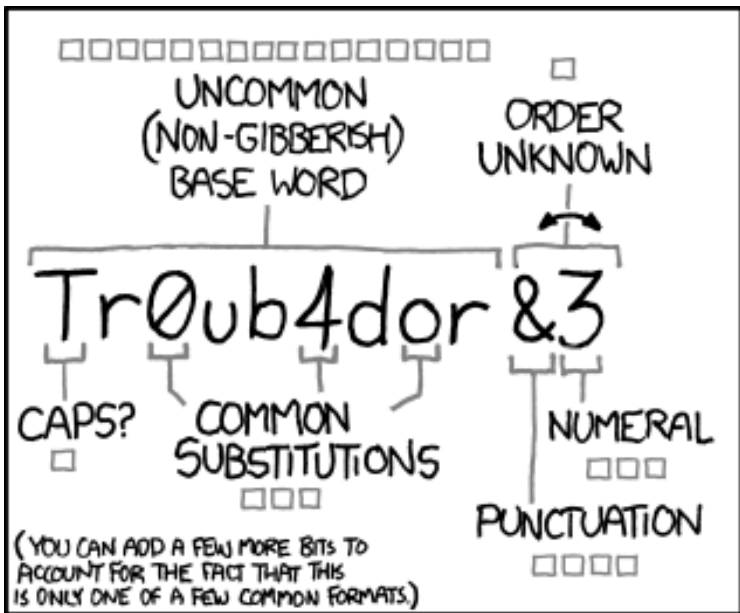**So how do I protect myself?**
- Use Secure Browsing (HTTPS)

Security & The Cloud

So how do I protect myself?
- Use Strong Passwords
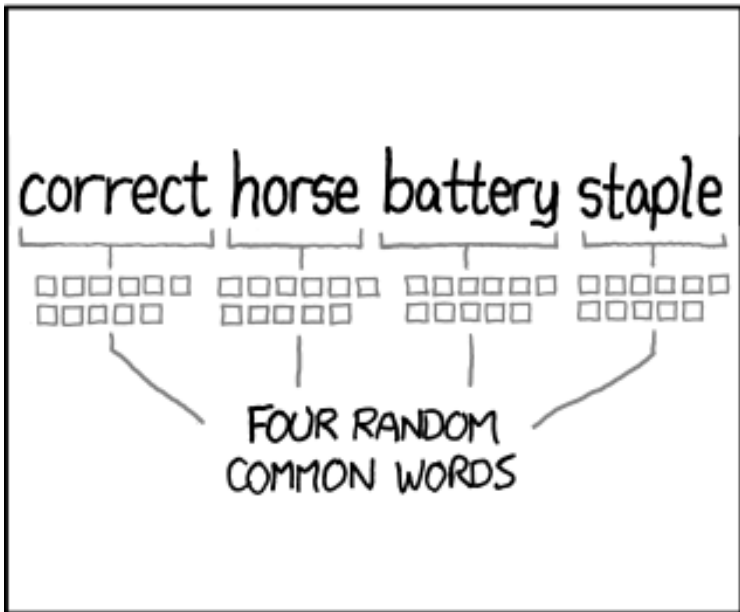
THROUGH 20 YEARS OF EFFORT, WE'VE SUCCESSFULLY TRAINED EVERYONE TO USE PASSWORDS THAT ARE HARD FOR HUMANS TO REMEMBER, BUT EASY FOR COMPUTERS TO GUESS.

Security & The Cloud

So how do I protect myself?
- Use Encryption
  - Data (files)
  - Use VPNs for your connection to the Cloud Service

Data Backups in the Cloud

- Cloud storage providers include...
  - Dropbox
  - Box.com
  - Carbonite
  - Google Drive

CRM as a Strategy

CRM- Constituent Relationship Management

The process of managing and engaging constituent relationships and activities:
• Program participation
• Fundraising and Development
• Reporting & Querying

Technology Systems that supports CRM

- Contact management
- Financial/Accounting
- Databases (Access, File Maker Pro, etc.)
- Spreadsheets
- Productivity (Email, Word Processing, Spread sheets, etc.)
- Communications (social media, mass email, content management)

What comes first? CRM or Technology

CRM!

A defined approach to constituent management is a key component in defining technology needs.

- Identifying key objectives and requirements around reporting, querying and outcome evaluation should come first.

Am I CRM Ready?

- Several systems to manage data
- No interconnectivity or interconnectivity requires manual work
- Business continuity planning is difficult due to access, corruption, loss or

What are my objectives?

Sample objectives could include:
- Enhanced data collection and storage on constituents (demographic for grants, etc.)
- More knowledgeable about constituent needs, historical and present interactions with you organization
- Ability for departments to communicate based on identical datasets

What are my options?

Sample objectives could include:
- A single platform that integrates systems across departmental functions
- Can grow with your organization needs and be modified as business needs change
- Easily accessible to fields workers and remote employees
- Non cost prohibitive

What solutions are available?

Cloud Based Solutions:
- GoogleApps
- Salesforce.com

Integrations:
- Wordpress.com
- Joomla.com
- MailChimp

What should I consider?

Total cost of ownership
- Annual licensing fees, training, intial configuration
- Systems maintenance: integrations, database management (upgrades, de-duplication, cleaning data, etc.)

Available Staff Resources
- Adoption champion

What should I consider?

Total cost of ownership
- Annual licensing fees, training, intial configuration
- Systems maintenance: integrations, database management (upgrades, de-duplication, cleaning data, etc.)

Staff
- Adoption champion
- Technological savvy
- Executive buy-in

Use Cases

- Tracking the efficiency of appeals and fundraising campaigns
- Event registration
- Demographics tracking
- Telephone campaigns
- Volunteer Tracking

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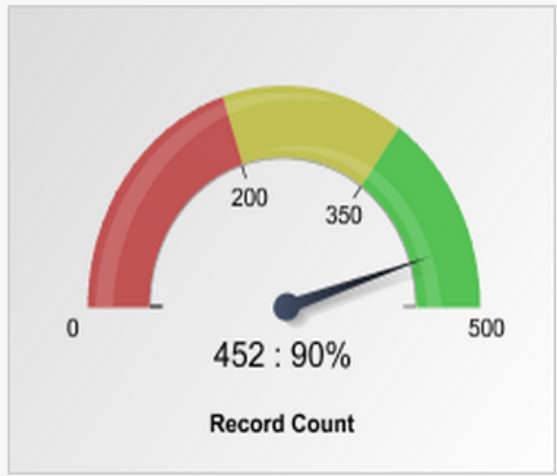Friday September 13, 2013

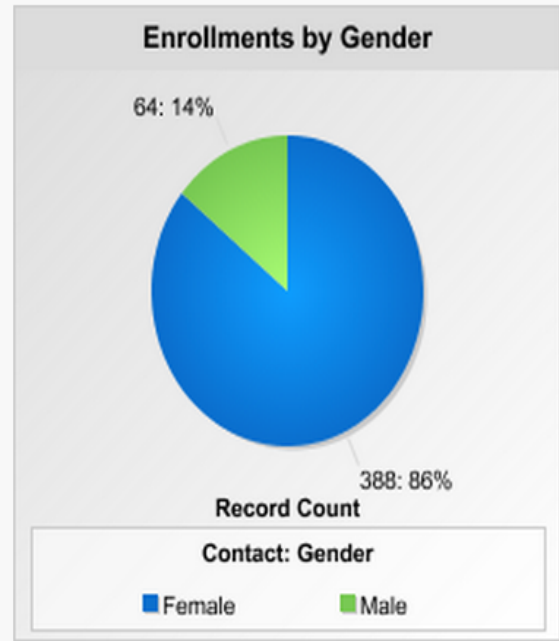Show Feed

Dashboard

Refresh

Customize Page

As of 3/7/2013 10:57 AM. Displaying data as Idealist Consulting.

People Program Enrollments

200   350

0   500

452 : 90%

Record Count

People Program Spring 2013

Enrollments by Gender

64: 14%

388: 86%

Record Count

Contact: Gender

■ Female   ■ Male

People Program Spring 2013

Enrollments by Ethnicity

10: 2%
2: 0%

104: 23%

6: 1%
8: 2%
2: 0%

320: 71%

Record Count

Contact: Ethnicity

■ -   ■ African-American
■ Asian   ■ Hispanic/Latino
■ Native American
■ Other

💬 Chat

Search Desktop

start   Google   10:56 AM

Volunteers Dashboard

Volunteer Leaderboard

Top Volunteers by Lifetime Hours

Full Name	Sum of Hours Worked
Pavlova, Stella	165
Barr, Tim	69
Song, Arthur	60
Frank, Edna	47
Habib, Terra	37
Habib, David	36
Marley, Ziggy	11
McCartney, Paul	11
Bunin, Alan	8
Levy, Babara	8
Pig, Porky	7
Carey, Drew	6
James, Ashley	6
Lennon, John	5
Marley, Bob	4
Akson, Bo	3
Bond, John	3
Davis, Josh	3
Depp, Johnny	3
Rogers, Jack	3
Wayne, Jerry	3
Habib, Zappa	3
Duck, Daffy	2
Green, Avi	2
Mouse, Mickey	2

Top Volunteers by Recent Hours

Full Name	Sum of Hours Worked
Habib, David	36
Habib, Terra	9
Marley, Ziggy	6

Total Hours This Year

500
100
0
1,000

45.25

Sum of Total Hours Worked

Volunteer Hours by Month

Bar chart — Sum of Total Hours Worked by End Date:
- March 2012
- October 2012
- November 20..
- December 20..
- January 2013
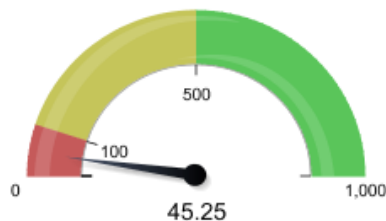
Total Volunteers This Year

100
50
0
200

13

Sum of Number of Volunteers

(non-unique counts)
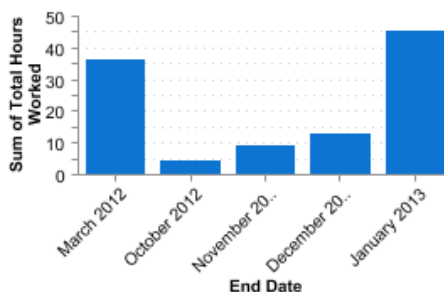
Unique Volunteers This Year

100
50
0
200

5

Number of Volunteers

Volunteers by Status

Pie chart — Record Count:
- 43: 59% (Active)
- 29: 40% (New Sign Up)
- 1: 1% (Other)

Record Count
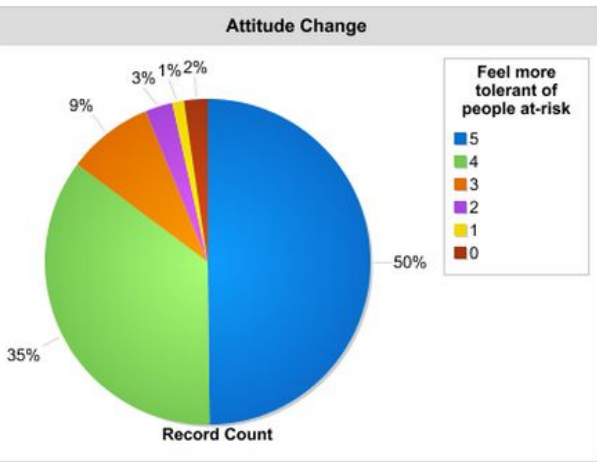
Volunteer Status

■ Active   ■ New Sign Up   ■ Other
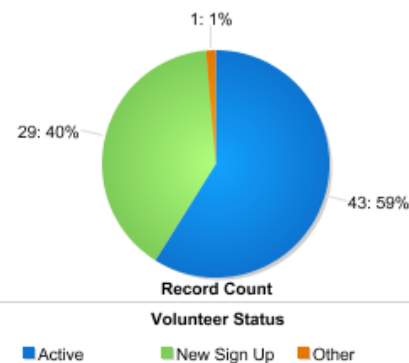
Presentation Evaluations

Find a dashboard...

Edit | Clone | Refresh ▼ As of July 31, 2012 at 11:26 AM

More tolerant of People At-Risk

Attitude Change

Feel more tolerant of people at-risk
- 5
- 4
- 3
- 2
- 1
- 0

50%
35%
9%
3% 1% 2%

Record Count

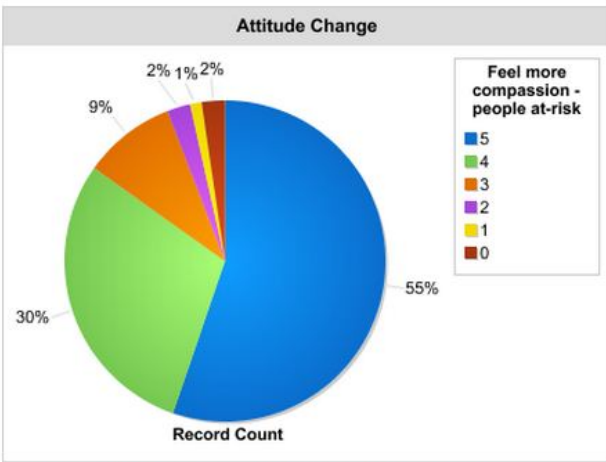5 - a lot, 4 - quite a bit, 3 - somewhat, 2 - a little, 1 - very little

More understanding of People Living w/ HIV

Attitude Change

Feel more understanding of PHA
- 5
- 4
- 3
- 2
- 0

51%
36%
7%
4% 2%

Record Count
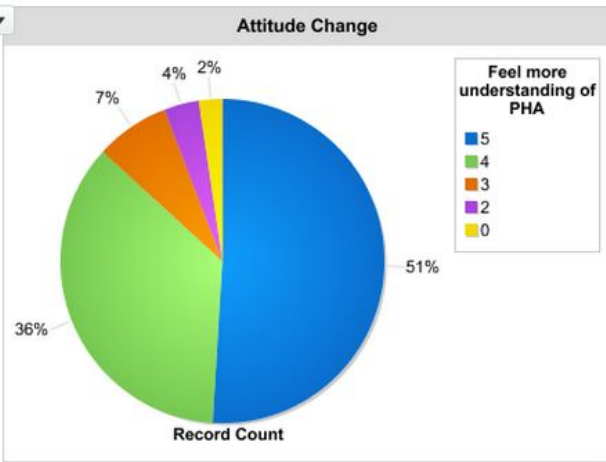
5 - a lot, 4 - quite a bit, 3 - somewhat, 2 - a little, 1 - very little

Feel more compassion for people at-risk

Attitude Change

Feel more compassion - people at-risk
- 5
- 4
- 3
- 2
- 1
- 0

55%
30%
9%
2% 1% 2%

Record Count

5 - a lot, 4 - quite a bit, 3 - somewhat, 2 - a little, 1 - very little

Will change behaviour/reduce risk

Behaviour Change

% Reporting Knowledge Increase

Knowledge Increase

Overall Evaluation

By Presentation

Contact Us

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