

2011

The Idealware

FIELD GUIDE to Software

for: **Nonprofits**

.....
A Quick Guide to Essential
Software for your Organization

Presented By:



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Welcome

We love working with nonprofit leaders and organizations! You are passionate about your mission, your community, and the people you serve. You make incredible things happen for your clients and communities on a regular basis. The world is a better place because of your efforts.

As capacity builders for nonprofit leaders, organizations, and community change makers, X Factor Consulting works with folks like you to make the world a better place. Our focus is on unleashing the potential of and maximizing possibilities for nonprofit organizations so they can continue their work and fulfill their mission. We do this by helping leaders plan and prepare for the long-term sustainability of their organizations and programs. We also realize you need access to the best tools available in order to achieve this goal.

That's why we are delighted to partner with Idealware to provide you this copy of *The Field Guide to Software for Nonprofits*. Idealware developed this guide to help you cut through the clutter and hype so you can determine what products will best meet your existing needs and grow with you to meet your future needs.

This edition focuses on key concerns for all nonprofits—Fundraising, Constituent Management, Communications, Outreach, Collaboration, and Back Office and Productivity. We believe this is a valuable resource for you and are thrilled to offer it to you as our gift. This guide will help you find the tools you need to leverage your resources for greater impact.

You can learn more about X Factor Consulting by reading about us in the Resource Section of this Field Guide, visiting our website at www.xfactorllc.com, or calling us at 1.800.883.7196.

Keep making the world a better place,

Kevin D. Monroe

Managing Partner, X Factor Consulting

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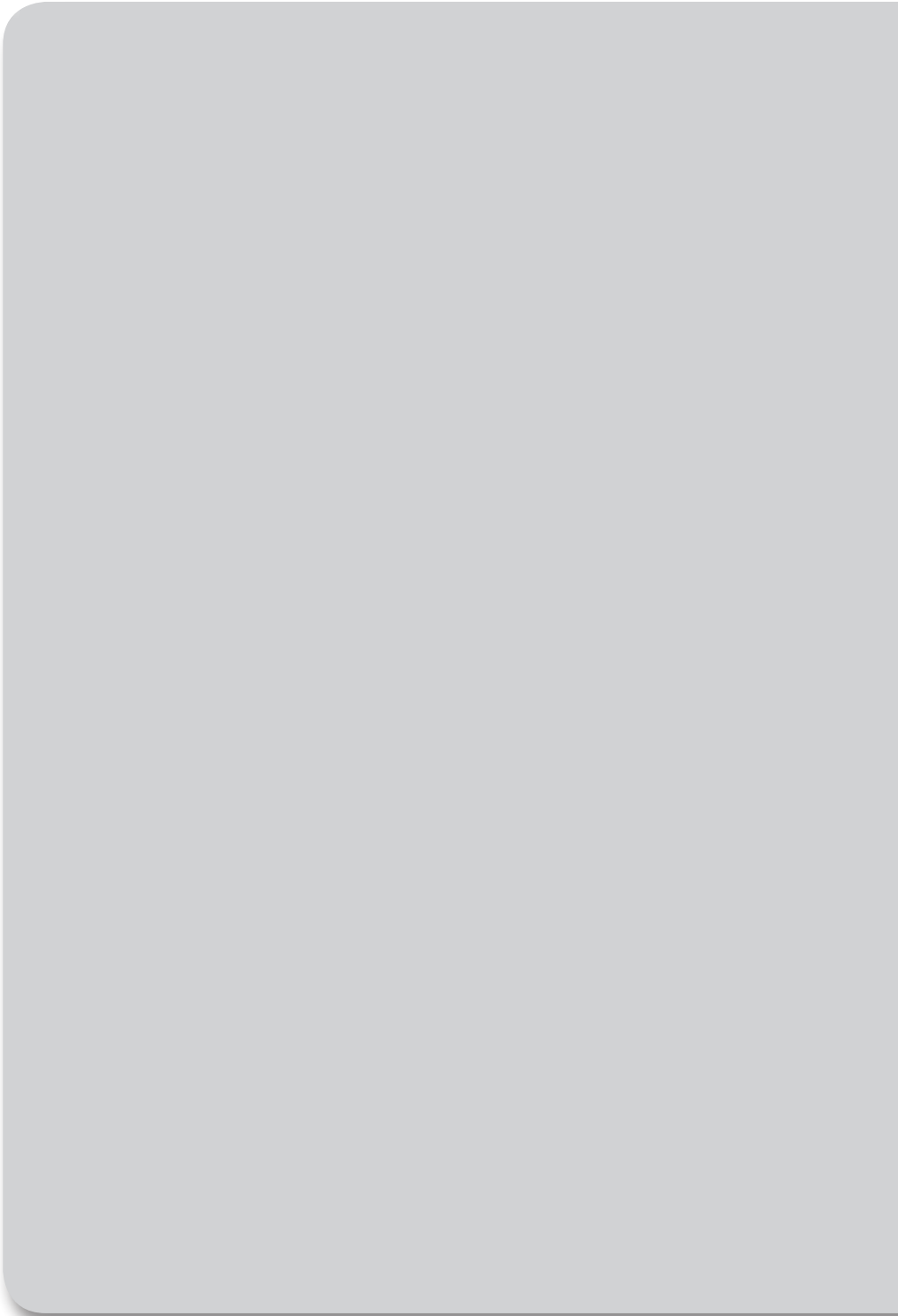
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What types of software would be helpful for your nonprofit in the areas of fundraising, outreach and communications? The *Field Guide* is designed to answer exactly that question.

This Introduction helps you understand how to use this guide, walks you through the software we believe every nonprofit organization should have, and provides an overview of a few key terms.

Ready to think through the types of software your nonprofit is likely to find helpful? Dive right in!

This *Introduction* walks you through the software we believe every nonprofit organization should have, regardless of size or mission, and provides an overview of a few key terms that apply to nonprofit software.

The *Case Study* section provides an overview of the different types of software used by a set of fictional—but plausibly realistic—nonprofits. If you're unsure what you might need, this is a good place to start. These examples can help you pinpoint the specific types of software to investigate further in the next section.

The remainder of the guide is organized to help you find the types of software that might be useful based on the goals you're trying to achieve. We'll walk through the software designed for five different areas: *Back Office and Productivity*, *Collaboration*, *Constituent Management*, *Fundraising and Events*, and *Outreach and Engagement*. In each section, we'll first take an overall look at the types of software that might be useful based on your own situation and your organization's level of technical sophistication. Each section then contains an introduction to the software types that might be useful in that area—59 different types of software in all.

Note that some systems overlap different areas—for example, *Page Layout* software can be considered part of both the *Back Office and Productivity* area and the *Outreach and Engagement* area because of the different ways in which an organization might use it. In those cases, we included the full description of the system in the area in which we think they fit best for their primary use, but also refer to them in other sections.

We recommend that you begin with the case studies or the walk-throughs for each category to identify the types of software you're likely to find useful. Every time you see a software type highlighted *like this*, it means we covered it elsewhere in this guide, so you can refer to the appropriate section for more information. Having trouble finding something? Consult the *Index* at the back of the book for a handy reference to all the types of software covered.

Where did all this information come from? At Idealware, our mission is to provide information to help nonprofits make smart software decisions. Over the years we've done impartial research and reviews of many different types of software. This Field Guide is the synthesis of all that research—it boils thousands of pages of reports and articles down to a handy, concise guide. But of course we couldn't do it alone. Dozens of nonprofit technology staff and consultants reviewed this Field Guide content to make sure it was accurate and useful. At the end of the book, you can learn more about the Idealware staff and generous reviewers who made the Field Guide possible. ●

Systems that help with common tasks like managing constituents and maintaining websites can benefit nearly every organization, regardless of mission or budget.

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Back Office and Productivity

Whatever your mission, there are certain tools you'll need to manage your organization and staff day in and day out. If you have more than one staff member, an Excel spreadsheet is not going to suffice for accounting purposes—you'll need a dedicated *Accounting* system to track finances, expenditures and payroll.

Office Software is important to help you create and edit documents, spreadsheets, presentations and all the other materials on which organizations run. *Email and Calendar* software lets you and your staff send and receive critical emails and share your schedules. You'll need an Internet connection to support email, obviously, and if you have an Internet connection you need *Virus Protection* software to keep malicious computer viruses and spyware from compromising your data or your productivity.

Finally, you'll need a *Data Backup* solution to protect your organization's data and save you the time, cost and effort of recovering from a data loss.

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Collaboration

Whether you have two staff members or two thousand, you need some way to share and manage files with each other and with the other people your organization interacts with. A good *File Sharing* system won't break the bank, but will make your life noticeably easier.

Managing Constituents

Most fundamentally, you'll need some kind of software to track donors, event attendees, volunteers and other constituents. Excel spreadsheets are great for maintaining a family task list, but quickly show their weakness when you begin tracking even just a few complex interactions, such as donations. A good database should let you store all the information you'll need about all your supporters.

What type of system will best help you will depend on your specific needs and budget. There are a number of basic types, each ranging widely in cost depending on the features you want. Every organization needs some type of system—a *Donor Management*, *Constituent Relationship Management*, *Association Management*, *Case Management* or *Volunteer Management*, or an *Integrated Online System*—but which one makes most sense for you depends on your specific needs. (See the Managing Constituents section for more information.)

Fundraising and Events

Of course, it's important for every organization to raise funds—and to do that well, you'll need some kind of system to track constituents, and effective ways to reach out and engage people, as covered in the next section.

Outreach and Engagement

In addition to tracking constituents, it's important to have a website that clearly communicates who you are and what you do. In order to easily update your website yourself with new information or events as they happen, regardless of how technical you are, you'll need a *Web Content Management System* (CMS). Unfortunately, it's not easy to add a CMS into an existing site, but almost every organization should consider using one when building a new site.

You should also have a *Broadcast Email* package designed to send out emails to hundreds (or millions) of people. Email is a quick and cost-effective supplement to direct mail or face-to-face communication, and a great way to reach out to or engage constituents or to fundraise, but it's important to have a different tool for your *Broadcast Email* than you use for your individual emails. ●

Hosted, Installed and Open Source Systems

When searching for software systems, you're likely to hear the terms "hosted," "installed" and "open source." What do they mean, and what are the benefits of each?

Installed systems are software packages you install directly onto your own computers—for example, the Microsoft Office Suite. Typically, the application is managed by a license agreement, and you can purchase a number of licenses to install the software on more than one computer.

Open source systems are typically also installed—either on desktops or a web server—but you can download and install the software on as many computers as you like without cost. Open source systems also allow you to modify and share the source code if you have the skills—thus the term "open source." While open source systems are particularly attractive to some organizations because of their cost and flexibility,

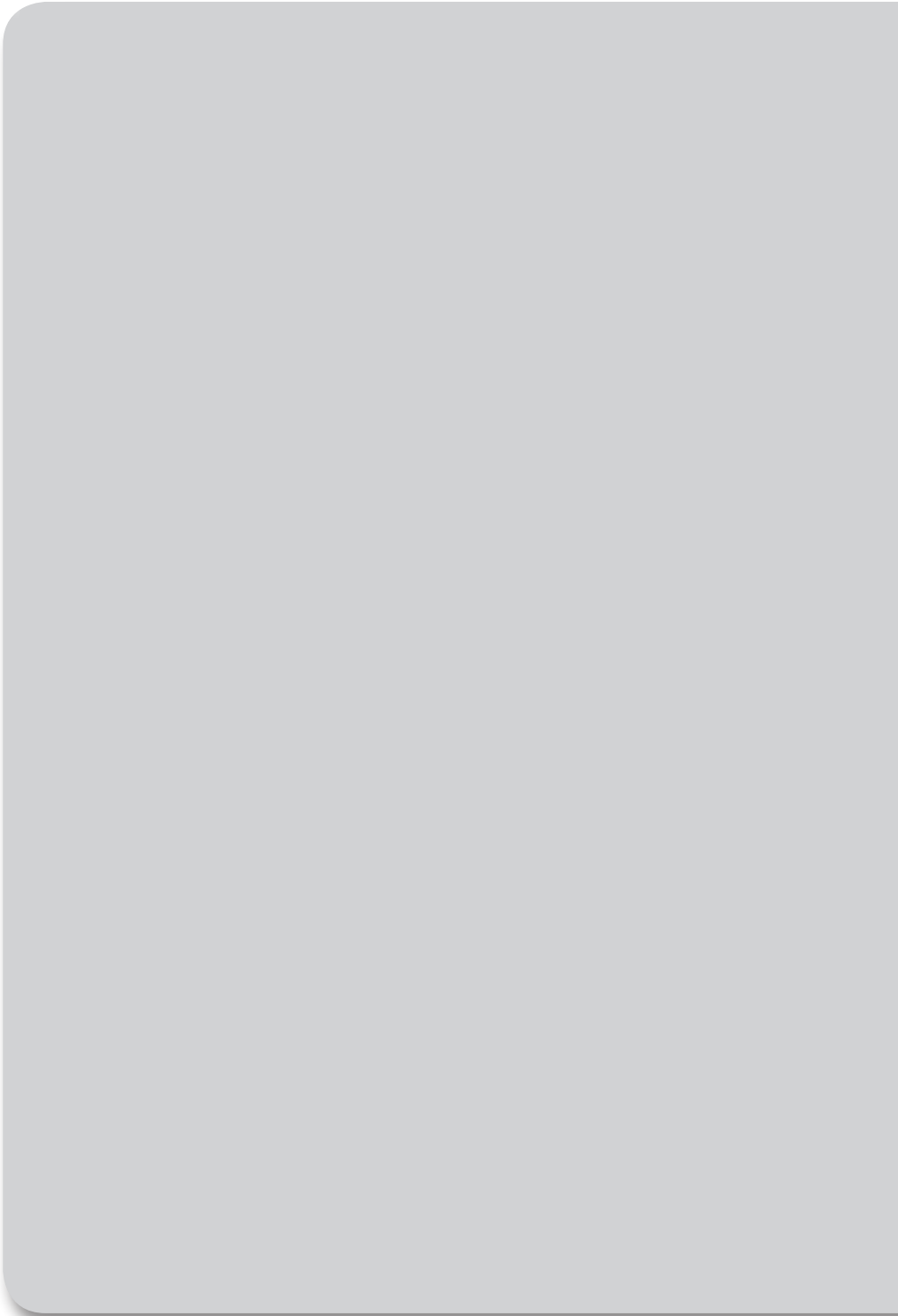
it's important to compare them to other potential options carefully; it doesn't matter how free something is if it doesn't meet your needs. Many open source software packages will also require technical skills to get them up and running.

Hosted systems give you an alternative to installing the software yourself. Instead, you typically pay a vendor a monthly fee, and access the tool over the Internet. The vendor is in charge of updates, backups, maintenance and security—likely providing a more-secure and stable system than small organizations could provide on their own networks.

A more general way to think of these approaches is “buy vs. rent.” You buy installed systems, install them on your computer and are responsible for keeping them upgraded (like renovating a house). You rent hosted systems, accessing them online when you need them, and the vendor (like a landlord) is responsible for maintenance. With an open source tool, you may get the software for free, but you'll likely either need to be handy to maintain it yourself, or hire someone to do it for you.

Each approach has its benefits. Installed systems are always accessible, even if the Internet is down, and there's no risk of performance lag if the connection is slow or traffic heavy. Open source systems can be very feature-rich, but are often more complicated to install, configure and maintain. Hosted systems, on the other hand, typically require little technical skill, as the vendor is in charge of updates, backups and maintenance. You may pay more up-front for an installed system (especially if you need to hire a consultant to help get a more complex open source system up-and-running), but you may well pay more in the long run for a comparable hosted system.

Which approach is the right one? There's no one answer: It depends substantially on your own goals and what type of software package you're considering. Ultimately, it's much more important that the features, access method and cost structure work for you.



How can different types of nonprofits most effectively use software? This section provides examples of how fictional-but-realistic organizations use software to meet their needs. It starts with smaller organizations that aren't yet ready to make a big investment in software, and then moves to larger organizations with more complex needs.

All of the software names highlighted within the text are covered in more detail in this guide—look them up to learn more.

Shoostern Music History Society

Just Getting Under Way

1 Staff Member/\$100,000 budget

Less than a year ago, the Shoostern Music History Society received a seed grant to create a nonprofit organization around a single gift. The gift—hundreds of music instruments—came from a benefactor with a deep interest in the history of music. The nascent Society provides historians and scholars with access to the collection, and supports research on the history of music.

The seed grant will support the Society's single employee, Julie, for a few years—enough for her to get everything up and running. It won't last beyond that, however, meaning that fundraising is a top priority. The Society also needs to reach out to its local community, and nationwide, to let scholars interested in antique instruments know the collection is available for study.

Julie started with the basics. She knew that she'd need *Office Software* and tools to support *Email and Calendaring*, as well as a way to track their finances in a straightforward *Accounting* system. She uses free *Virus Protection* software and inexpensive online *Data Backup* to ensure the safety of the organization's contacts and other materials—though the Society is small, their information is priceless.

With her software infrastructure in place, she began her fundraising process by creating lists of possible individual donors, foundations and scholars in Excel spreadsheets. Before long, she realized the spreadsheets would make it difficult to track multiple donations and the small, but important, number of scholars who were also donors.

She spent about \$400 for *Donor Management* software that can track all the people with whom she interacts. It's made a huge difference—she imported all the Excel spreadsheets she'd created with no trouble, and can easily find people, enter gifts, and create lists of people she needs to call or mail. She considered a *Constituent Relationship Management* system, but decided she didn't

actually need much additional functionality beyond donor management—why deal with the extra complexity and setup of a more complex system?

Now she's looking at ways to keep constituents engaged. Many of them are academics, and an *Email Discussion List* would let them keep in touch with each other—and with the Society—about issues of mutual importance. She also knows the value a good website can bring to an organization, but doesn't know anything about web design and is afraid a static site built using do-it-yourself-software will look unprofessional. The budget can't support a full-time web staffer, so she hired Matt, a consultant, to build the site. She chose Matt primarily for his experience with free *Web Content Management Systems*—he showed her how to use the software to update the site's text and images so that once the site is built she can keep it fresh.

Down the road, Julie would like to add an online “virtual tour” of some of the instruments in the Society's collection that highlights the heart of the organization. *Photo Editing* or *Multimedia Editing* software would make it easier and more affordable for her to do things that she would have needed professional-caliber tools for just a few years ago.

She also created a *Facebook* page for the organization, and tries to spend at least two hours a week posting updates, but since her constituent-base is not likely to seek out a more steady social media presence from the organization, she's relegated such actions to a lesser role.

What's next on the software front? Julie's considering the best way to create a newsletter—initially she wanted a printed newsletter, and looked into *Page Layout* software to help create it, but now she's leaning toward an email newsletter. If she had a solid *Broadcast Email* package she could use it to send not only eNewsletters, but email appeals, as well, killing two birds with one stone. *Online Donation* tools would help her handle the resulting gifts and pledges.

She's confident that with the right software she'll be able to successfully run the entire organization and serve her audience well, despite being the only staff member. That's music to her ears. ●

Kids' Collective

Building Up Fundraising and Communications Infrastructure

8 Staff Members/\$800,000 budget

This is an exciting time for the Kids' Collective—the organization just received a \$100,000 grant to increase the number of children it serves with afterschool service-learning programs. Eager to use this momentum to grow fundraising and outreach work, the eight staff members rely on an army of volunteers to deliver many of the organization's programs, which means a lot of feet-on-the-ground work and scheduling to coordinate, and a lot of people to organize.

A few years ago, Joanna, the executive director, made the decision to invest in a *Constituent Relationship Management* system to manage all their key constituents—the kids in the programs, their parents, donors, volunteers and more. Since there's a lot of overlap between these groups—for instance, parents often volunteer or donate, and some of the kids have even grown up to put their kids into the program, creating a second generation—Joanna wanted to be able to get a full view of specifically how each person is involved. This made a CRM system a better fit than either a *Donor Management* system, which couldn't easily track their program participants, or a *Volunteer Management* system, which was too narrowly focused. The system also provides basic *Broadcast Email* and *Event Registration* functionality, integrating these online components while eliminating the need for additional software packages.

Kids' Collective does have a separate *Online Donation* tool, though. Their development director exports data from that system, and then imports it into the CRM system to sync the two.

The CRM Joanna chose provides great functionality for communications and fundraising—it's easy to email an eNewsletter to subscribers each month, create labels to mail paper newsletters, and support quarterly appeals. And she worked with Eric, the

organization's communications director and "accidental techie," to set up an *Email Discussion List* that lets board members, major donors and core supporters discuss ideas for the organization. The list has turned out to be a bigger-than-expected success in understanding what's important to those groups, and engaging them with ways they can help.

As it's important to the organization to proactively understand what its community wants, Eric installed a *Web Analytics* package to get a sense of what Kids' Collective events and resources people found most interesting on the website. Since people also talk about such things online, he's using *Online Listening* to monitor those discussions as well as circulating an *Online Survey* to more proactively check in with staff and kids via a quarterly survey. They've discussed using a *Dashboard* to make it easy to see all of these different metrics into one view, but they're not sure if it would be worth the time to set it up.

A lot of the Collective's programs are based around specific events—for instance, a big volunteer-kickoff day to encourage high school kids to join a longer-term service program. The organization does a lot of promotion to cast a wide net for these events, both on- and offline. A *Web Content Management System* makes it easy to post events and information about them on the organization's web page, but Joanna and other staff post on social networking sites too—particularly *Facebook*, which is widely used by the kids they work with. They use it to promote specific events, but it works to publicize the organization, as well. Using *Event Registration* software, kids can RSVP to events. This streamlines the process somewhat, but it's always a little hit-and-miss to try to figure out who's coming.

The events involve a lot of coordination as well, and staff relies on a number of different back office and collaboration tools to help keep everyone in synch. They couldn't function without the *Email and Calendaring* software, and an online tool provides *File Sharing* functionality to allow both staff and volunteers to access documents from wherever they are. They also use a simple *Intranet or Portal* to post information, dates, and contact information for all the team members.

Joanna invested in professional-caliber *Page Layout* software, and her team creates posters for schools and community centers. Not coincidentally, the software's also great for laying out newsletters. Photos are a critical tool for the Kids' Collective to help show kids in action in the organization's newsletters, on the website and in promotional materials. Eric convinced Joanna that they didn't need anything fancy in this area—in fact, free *Photo Editing* software meets all their needs in editing photos for print or the web, and they can share whole libraries of them online using *Photo Sharing Websites*. The kids love seeing pictures of themselves and often post the photos on social networking sites—another way to promote the organization. Based on some of the emails Joanna receives, it turns out adults love seeing their own pictures taken at events, as well.

When Joanna noticed how many of the kids had their own cell phones—and how many of their parents used them to keep in touch—she worked with Eric to help her optimize their website for visitors browsing on smartphones, which was much easier than creating a separate *Mobile Website* while meeting many of the same goals. They've also begun to discuss *Mobile Text Messaging* to take advantage of a communication method growing in popularity among their constituents.

Recently, Eric launched a *Custom Online Community* to allow kids active in Kids' Collective programs to talk to each other and share information. So far it's off to a slow start, possibly because the kids already participate in so many other online communities, but Joanna is hopeful—engaging kids online could be a great stepping stone to keeping them connected.

In the short term, she wants them to participate in more events, but she's also hopeful that as they grow older they will become volunteers and donors themselves, passing on all that they have learned. ●

Seeds of Hope

Telling Their Story Online

6 Staff Members/\$1.5 Million budget

U.S.-based Seeds of Hope uses seed grants and training to help former child soldiers in Africa earn a sustainable living, often through farming. The nonprofit relies on technology more than many, existing as a sort of “virtual organization.” Not only are most of its constituents on another continent entirely, but the handful of staff members are spread out across the United States. Lawyer David Landis started the organization after spending time volunteering in Africa. He recruited other staff members based on their skills rather than their location, and invested a portion of the seed grants in technology to facilitate a remote workforce, knowing it would also enable the organization to eventually serve constituents around the world.

Ensuring all the staff members can share information from wherever they are is a challenge. They decided that a straightforward *File Sharing* solution wouldn't let team members search and find information like they needed to, so they decided to invest in an online *Document Management* system that lets anyone easily archive and retrieve files from anywhere. They also use more straightforward *Collaborative Documents*, especially to work on documents together in real-time. *Screencasts and Screenshots* and *Online Conferencing* tools also let them share information visually across the world.

The organization relies on individuals in the States for a portion of its funding, and for their help advocating for effective U.S. aid policies. This means the organization must reach out to and connect with potential donors and supporters all over the world in a variety of ways.

David leveraged the organization's early results by posting individual success stories of former child soldiers on Seeds of Hope's website each month and fleshing them out with compelling photos and videos. He invested in a strong *Web Content*

Management System that lets him and his team upload and format these posts in intuitive ways. David's coworker, Heidi, took a few classes to learn the basics of a professional level *Photo Editing* package. Now she can edit photos sent from the field and format them for the web or print publications. In addition, by posting photos to *Photo Sharing Websites*, she helps a wider audience find their stories. David tracks *Web Analytics* to see which stories are of most interest to site visitors, so he can tailor future updates accordingly.

Some of the most popular posts are videos recorded in the field. They found that the videos don't need to be incredibly sophisticated or expensive to work—Heidi learned to use free *Multi-media Editing* tools to cut and join video clips, and to add titles, credits and voiceovers. She posts them on a *Video Sharing Website*, which provides free video hosting, and then embeds the videos on Seeds of Hope's own site—these combined methods distribute videos to a wider audience than either method alone. Staff has also been experimenting with adding their stories onto *Social Content Websites* to try to draw in a different audience.

These success stories have worked so well that the organization's recently begun to build around them for education, outreach and fundraising. Three staff members in the field have started *Blogs* that follow a few of the people introduced in these stories and videos. In addition to reaching new audiences, the blogs keep those interested updated on the former child soldiers' progress over time. It's a great way to keep people engaged with the organization's issues and work, and with the organization itself.

They find *Charts, Maps, and Diagrams* to be an invaluable tool in showing the need for, and impact of, their work. On their website, they show frequently updated maps of the regions with the most former child soldiers, overlaid with information about the people and communities that they've helped through their programs and services.

David and other staff are also trying different online outreach methods to help put these stories in front of new people who

might care about them. They use *Search Engine Optimization* to boost traffic to the website, invest in targeted *Online Advertising*, and experiment with social networking sites—primarily *Facebook*, which reaches a broad swath of interested people, and *Twitter*, where David posts a number of times a week or whenever he finds links to disseminate. *Online Listening* and *RSS* help them understand what people are saying about Seeds of Hope.

Of course, the core goal of the success stories is to move people to action. With each story, web visitors find a call-to-action prompting them to join an email list, and the organization holds a number of fundraising and advocacy campaigns every year to encourage list subscribers to take action. Information about donors and activists is stored in an *Integrated Online System*, which replaces the need for separate *Broadcast Email* and *Online Donation* software. Each year, David also encourages supporters—especially younger ones—to help raise money through *Friend-to-Friend Fundraising*, and to give via *Mobile Text Messaging*. They’ve even recently developed a *Mobile App* that provides timely news to their followers and lets them know how they can help.

As important as money is, the organization’s supporters play another role as critical advocates for effective U.S. aid that can support Seeds of Hope’s mission. David assigned a staff member to manage *Petitions and Pledges* and tools for *Supporting Online Actions* to encourage supporters to act in favor of critical aid reform. As more and more people get involved in the cause, they’re starting to organize themselves a bit—eager to encourage this, David and Seeds of Hope promote *House Party and Meet Ups* using tools that let interested parties arrange and publicize in-person meetings. The same *Photo Editing* tools and *Photo Sharing Website* they use to distribute photos from the field lets them share images from their gatherings.

Thanks to technology, location no longer makes a difference—but Seeds of Hope and the people behind it do. ●

Springfield United

A Fundraising and Outreach Powerhouse

35 Staff Members/\$3.5 Million Budget

For half a century Springfield United has supported and helped grow the city of Springfield. A six-person fundraising team works to raise money through a wide assortment of campaigns, special events and grant support, and distributes it where it will do the most good.

The headline event is Springfield Days, a two-week fundraising push held each May that includes a publicity campaign and walk-a-thon, culminating in a gala dinner and auction. The logistics are daunting, but sophisticated software makes managing them possible. The Springfield United team uses *Event and Auction Management* software to manage the complicated gala arrangements, including the seating plan and the on-site live auction. The team also uses *Event Registration* tools to help sell tickets online. There's an online component, as well, which the team runs using *Online Auction* software.

Every year Springfield United screens a new "Faces of Springfield" video at the gala to showcase the organization's work and the strength of the town. Team members used to outsource the video production to professionals. The past few years, however, they've begun producing the video in-house using *Multimedia Editing* tools.

A major focus of Springfield Days is the Saturday walk-a-thon. Many supporters have participated for years, raising money from their friends and family with their walk. For the first time last year, the organization also tried using an online *Friend-to-Friend Fundraising* component for the walk-a-thon, which worked well. Some supporters were more comfortable creating their own online fundraising pages to reach out to people they know, rather than asking them in person. Others enjoy throwing their own events

for the cause—the organization’s *House Party and Meetup* tools let them post and publicize parties and gatherings, and lets others find events they’d like to attend.

Despite the success and popularity of Springfield Days, fundraising and outreach isn’t just a two-week affair. Recognizing this, the team mounts various campaigns and appeals throughout the year. A robust *Donor Management* system lets them manage a series of direct mail appeals and a substantial foundation-grant outreach effort. They’ve integrated with an *Integrated Online System* to handle the online side of things, including email appeals and online donations and additional functions like managing website content. The fundraising team is also considering adding a *Mobile Text Messaging* component to the mix, to send text messages to subscribers—providing yet another way to reach out to potential donors.

Major donors are a big part of the organization’s fundraising. To reach them the organization first created a core “major donor” team made up of development staff, board members and a few committed volunteers. Since team members work in disparate locations, the organization facilitates their work with collaboration tools. First, *Email and Calendaring* software set up in conjunction with a server lets them trade email and share their schedules with one another. An *Email Discussion List* and regularly scheduled *Online Conferences* allow them to trade strategies and keep in touch. *Collaborative Document* tools let them work together on shared materials, and an *Intranet* gives them access to shared organizational resources.

Project Management Software lets each team track its progress and manage each member’s responsibilities and deadlines, which makes working from different locations nearly seamless.

Similarly, the board of directors—key to the organization’s continued success—is made up of busy people who are rarely in the same location. *Board Collaboration* software lets members communicate with each other and with the executive director, and

makes sure they have the right materials to review and comment on as well as a regularly updated calendar of board- and organization events.

Springfield United has also entered, albeit tentatively, into social media. Staff members are experimenting with *Online Listening* to help understand what people are saying about the organization and its issues, and have posted to social networking sites to see if they'll engage new supporters and inspire them to donate or volunteer. They're trying *Online Advertising* on websites and blogs that cover topics related to their mission. In addition, the organization tried an online *Pledge*, encouraging people to "Buy Springfield" to support local stores and producers. The experiment went well—thousands of people signed the Pledge.

At a young staff member's suggestion, the organization is considering adding a *Geolocation* component to some of its bigger events to let attendees "check in" at the gala or post their progress at the walk-a-thon.

Overall, staff has found that the best software approaches help them to harness the passion and energy of the people of Springfield—something the city has in abundance. ●

Wooster Hall

Engaging the Community in the Performing Arts

42 Staff Members/\$2.8 Million budget

Wooster Hall's mission is simple—bring high quality performing arts, including music, dance, opera and theater, to the community. Over time, the small organization has built up a committed base of subscribers and donors. Now it's targeting new audiences, hoping to build the next generation of subscribers.

The performances are at the core of Wooster Hall's activities, and the majority of marketing and outreach is focused around them. The staff—led by Rachel, a former dancer with a lot of connections in the arts—carefully plans, lays out and mails a quarterly pamphlet of upcoming events, and keeps the website up to date with detailed information about each show. *Page Layout* software and a sophisticated *Web Content Management System* make these tasks easy and efficient. It's a challenge to manage all the images from so many events, along with the rights information, so the organization recently invested in *Digital Asset Management* tools to help.

Rachel also works with staff on *Search Engine Optimization* and *Online Ads*, putting careful thought into keywords to ensure that people searching for arts events in the community find Wooster Hall's performances. She posts to *Facebook* and *Twitter*, as well as *Niche Social Networking Sites* about the arts, and asks friends and followers to repost these announcements, which helps reach new audiences who may not otherwise be familiar with the performance series. She created a place page for the theater using *Geolocation Tools* and lets attendees “check in” at arts events as a means of building interest.

Informing new audiences isn't enough, though. The Wooster Hall team works hard to engage people who have attended past events to maintain and grow their interest. Those who've attended an

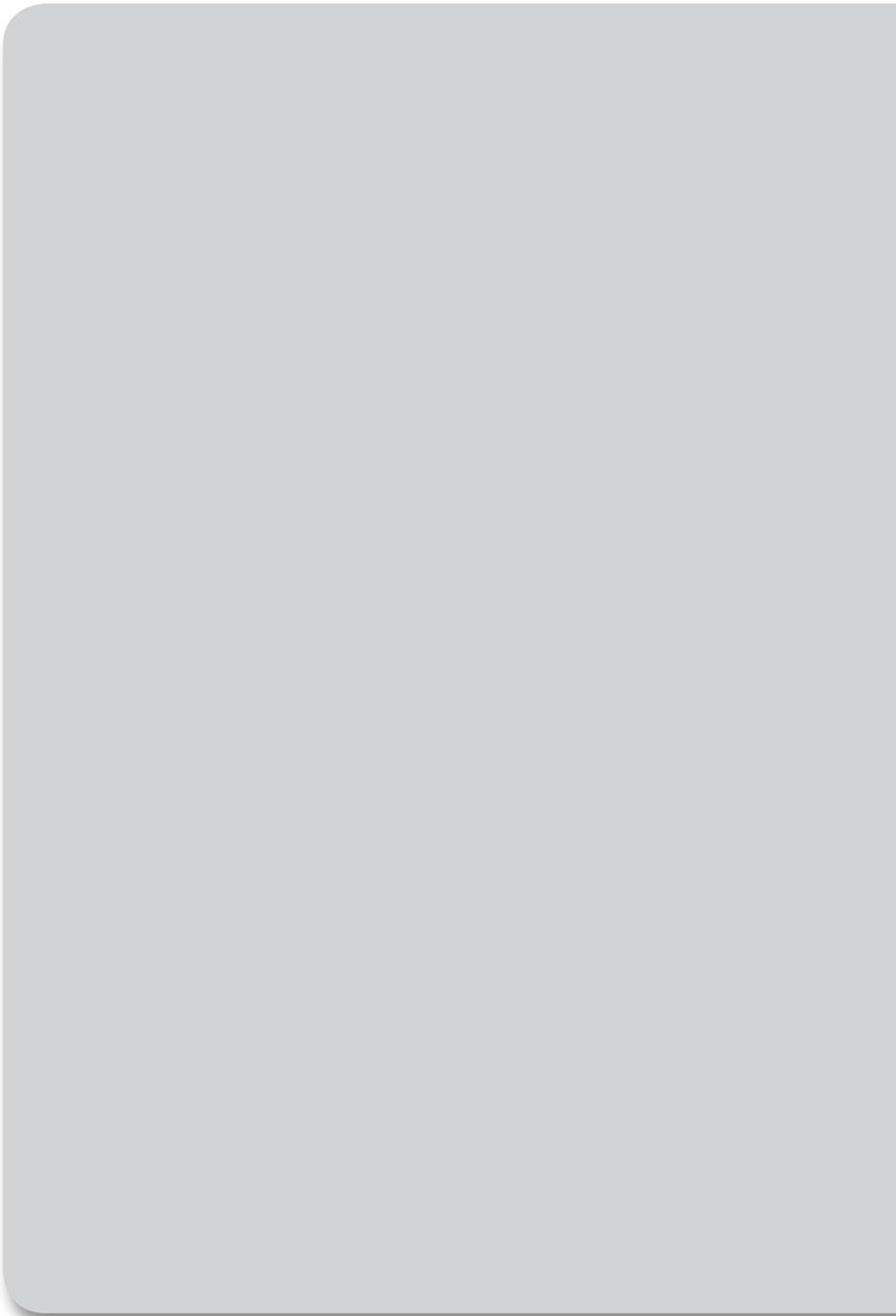
event are more likely to come to others, and much more likely to volunteer or donate—they're an important segment of the organization's audience. In the past couple of years, Rachel and the staff focused more and more of their efforts online. They posted clips of performances to *Video Sharing and Streaming* sites to let fans relive moments and forward them to friends, and they package the best speakers and music into a monthly *Podcast* series—10-minute shows subscribers can listen to in their cars or on their iPods. Jerry, the outreach coordinator, is a good writer, so he keeps a *Blog* featuring his “backstage” take on events. The blog has proven very popular—in fact, that the organization is planning a series of live “Online Salons” where Jerry will interview arts personalities while participants listen over their computers and post questions they'd like him to ask using *Online Chat*.

Rachel is also working with some of the artists to create *eLearning* modules that teach a little bit about their particular media. The more people learn about the arts, the more interested she hopes they'll be in attending performances, and today's new students are tomorrow's performing artists.

Most fundraising is done in two yearly appeals, conducted by both direct mail and email. A robust *Donor Management* system helps staff manage the details, including basic *Broadcast Email* and *Online Donation* functionality.

To keep constituents happy, Rachel carefully monitors feedback about performances and what people would like to see in the future. In addition to keeping an eye on the local media for reviews, she uses *Online Listening* to keep abreast of what people are saying online. This has become such a useful feedback loop that she created a “listening dashboard” using *RSS* to make it easy to see a summary of who's saying what. She also periodically surveys subscribers using *Online Surveys* to better understand what shows they'd like to see.

Of course, all the technology hasn't made her forget the best way of getting feedback from constituents—Rachel never misses a performance, and before and after each event, she's in the lobby shaking hands, mingling, and talking with the people who make her job possible. ●



Every nonprofit, regardless of its mission, needs a set of software tools to help with day-to-day work. From Office Software to Photo Editing to Document Management systems, these tools can help you be more efficient and effective.

All of the software names highlighted within the text are covered in more detail in this guide. Most of them are included in this section, and follow immediately after the descriptions. If you're interested in a software type and can't find it in this section, you can look it up in the Index.

In addition to the *Accounting, Office Software, Email and Calendaring, Virus Filtering* and *Data Backup* systems covered in the Every Organization Needs section, software designed to help with the day-to-day activities of any organization can make your work more efficient and hassle-free.

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Strongly Consider...

If you have a website, and you should, *Web Analytics* lets you measure who is visiting it, what parts of it are drawing them, and how long they stay. This can help you get a better sense of what's working to help you adapt to better serve and attract site visitors.

For your website, richly formatted emails, or any kind of newsletter or other communication, you probably use photographs—people love photos. If you use photos from events or the field taken by staff, volunteers or constituents, chances are you've wanted to edit them from time to time—say, to remove red-eye, improve the lighting, or crop out unwanted features. *Photo Editing* software,

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once the domain of the professionals, is now a standard tool for even the most amateur of photographers.

Page Layout software can help you design and layout those same materials, including newsletters, emails, pamphlets, brochures, flyers, posters or any other number of printed and online materials.

Keeping Ahead of the Curve...

Once you realize how easy editing photos can be, you might want to try editing video or audio—both excellent ways to engage constituents. *Multimedia Editing* software makes these kinds of challenges easy and affordable.

Larger organizations can create a considerable volume of documentation. It's a lot easier to create than to store and manage this output—especially when you go back to find something later. *Document Management* can help you keep the mountains of materials under control and within reach.

On the Cutting Edge...

Documents are not the only thing that can grow unmanageable—images, presentations, audio clips and other files pile up quickly. *Digital Asset Management* offers a way to archive, search and retrieve such files.

If you are tracking and acting on a range of metrics, it can quickly become overwhelming. A *Dashboard* lets you collect these metrics in a single, easy-to-view manner to make it more efficient and effective to monitor them. ●

Effective communication isn't just about talking—it's also about listening to what your constituents are saying, asking their opinions, and checking in regularly to see what's working and what's not. Using the right tools can help you manage your message.

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Strongly Consider...

If you track constituents in a *Donor Management or Constituent Relationship Management* system, think through the information you'll need to collect in order to know which techniques are working. How did you initially connect with each constituent? What communications have they received? What actions have they taken with your organization? Have they donated—and if so, how much, and in response to what appeal? This information can help you refine your methods over time.

Straightforward metrics can tell also you a lot about how your communications are working. Web Analytics can provide very useful information about how many people visit your site and what they're doing there. Similarly, *Broadcast Email* software

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can tell you how many are opening your email, and what they're clicking on.

Chances are people are talking about you whether you ask them to or not. Just as organizations can use a clipping service that collects their mentions in print media, *Online Listening* lets you search for online mentions and alert you to their presence.

But it can be useful to proactively ask people what they think, as well. Traditional research techniques like focus groups, interviews and user-testing work well, but *Online Surveys* provide a particularly quick and often very effective way to gather data. *Email Discussion Lists* let you ask quick questions of a group of core supporters.

Getting ahead of the curve...

When you're ready to go beyond what *Online Listening* can easily offer, *RSS* offers sophisticated ways to monitor the web, filter out what's most useful to you and create a dashboard to summarize it. It's also useful to participate in relevant *Social Content* and social networking sites where you can hear what people are saying and sometimes ask questions directly.

On the cutting edge...

Organizations that want to stay proactively on top of what their constituencies want and think can create advisory boards to help provide input and feedback. While these advisory boards can often function very successfully through in-person meetings, conference calls or via email, it's worth considering software that might help the group collaborate, like *Custom Online Communities* or *Wikis*. ●

Accounting Systems

If you're managing more than a few thousand dollars at a time, you almost certainly need an accounting system. Even if you have help with accounting—maybe bookkeeping, payroll, or someone to help out at tax time—you still need a solid system to track and manage revenues, expenses, payments and other finances.

Conversely, even if you have a good accounting system, you still need some knowledge of accounting—if you lack that knowledge, consider hiring a bookkeeper to set up the software so that it does what your organization needs it to.

Lower-end systems starting at a few hundred dollars will work fine for most organizations with one or two users and budgets of up to \$2 million. Intuit's QuickBooks is popular and relatively easy to get up and running. Sage's Peachtree can offer more flexibility, but assumes some accounting experience. Others, like FundEZ by E-Z Development Corporation, are designed specifically for nonprofits, and provide functionality of interest to nonprofits who need to track money in and out of complex funds.

Organizations with more than four or five users or budgets over \$2 million might consider more complex systems. At this level, the cost of implementation can sometimes exceed that of the software. Systems this size include MIP Fund Accounting by Sage, Fundware by Kintera, and The Financial Edge by Blackbaud, all nonprofit-specific systems aimed at larger orgs.

Not all organizations need systems created specifically for nonprofits. General business accounting packages, like Microsoft's Dynamics and Sage's Mas90, tend to be more widely used, which makes it easier to find help with setup, support and bookkeeping. They can also track inventory, billable hours or the like, and offer support not provided by most nonprofit-specific packages.

Accounting is a complex area, and there's a lot of high end systems available. If you manage hundreds of millions of dollars or more than a hundred people, or a complex, multi-unit national or international structure, seek expert advice on enterprise systems. ●

 For more resources,
see www.idealware.org/accounting

Data Backup

A backup strategy to prevent the cost and effort of recovering from lost files and data is made up of two components—the media and the method. The method determines what information you'll backup, how, and when. The media is the form backups will take.

Local backups, like external hard drives, network drives or removable media, guard against physical failure of a hard drive or server, but not severe events like fire, flood, theft or virus. Remote backups, which transfer data to shared storage centers via an Internet connection, excel in individual file- or folder-retrieval. The best backup strategy includes a combination of the two.

In most cases, data restoration from a local backup is going to be significantly faster than from remote, which can take a few hours to a few days. Most remote backup solutions also don't let you restore a system from a bare computer, including the operating system and software applications.

Local backups are primarily physical solutions, like a USB data key or a tape drive, used to backup an entire server. Software applications such as Symantec's Backup Exec or Windows' built-in backup utility allow an administrator to backup on a pre-set schedule. Specialized devices like those made by Datto and Barracuda Networks provide both on- and off-site backup through a networked storage drive programmed to also backup its contents up on the vendor's servers.

Remote backups are software solutions installed on each computer or server. The marketplace for these tools is growing every day, but popular tools like MozyPro, Jungle Disk, Cloud Drive and Carbonite offer powerful, easy-to-use software interfaces, affordably priced with either a per-Gigabyte or unlim-

ited flat fee model. The flat fee versions generally apply to desktop computers, and the per-GB versions for servers—the latter may be required to back up SQL server, Exchange or other multi-user databases.

Online File Sharing tools like Dropbox can also provide a lightweight backup option. ●

 For more resources, see www.idealware.org/databackup

What should you be backing up?

The simple answer is, “everything.” Or at least, everything that’s critical, valuable, irreplaceable or important to your organization. Consider each of your organization’s processes separately and account for each by identifying and backing up its data. And remember—backing up file servers won’t do any good if individual staff members are storing their valuable data on local hard drives. Make sure networked computers all have access to file storage, and that everyone on staff is using it.

Dashboards

Nonprofits track all sorts of information, from financial data to event attendance, volunteer participation, supporter involvement and more. A Dashboard—sometimes called an Executive Dashboard—is simply a means of making it easier to understand and act on all this information by pulling it together in one place, with easy-to-understand visuals.

A good dashboard pulls together different, and sometimes disparate, metrics into a visually appealing, easy to understand interface. Often it will show indicators that make it easy see progress against a goal—for example, a “traffic light” icon with a green, yellow or red light to show whether fundraising revenue is proceeding according to plan.


Deciding what metrics to track, and where to find that data, can be deceptively challenging, as can the logistics behind creating and displaying it as a dashboard. Unfortunately, there aren’t many tools intended to do specifically that, in part because the data varies so widely among organizations.

The simplest way to create a dashboard is to use one that already exists. Many *CRM* and *Donor Management* systems come with pre-programmed dashboards to track fundraising campaigns. For example, a flexible constituent database like Salesforce might track enough of the metrics you want to look at to simply create a dashboard as a report. Sharepoint, often used as an *Intranet and Portal* solution, provides dashboard features for those willing to invest the time to learn and implement the software.

Another straightforward approach is to use Excel, as you can easily paste in updated figures, summarize them on a highly formatted summary tab, and use charts and automatic color coding to create something highly readable—though it’s more difficult to make it beautiful. You could do something similar with Google Docs. Though not quite as powerful for creating complex calculations, Google Docs does provide such graphic dashboard formats as a gauge to show where your metric falls within a range.

There's also a whole class of software, such as the nonprofit focused JCA Answers Suite, or the more corporate Cognos or BusinessObjects, that are designed to help you pull data together from different systems and transform it into easily readable reports and dashboards. These are more expensive systems to implement that make the most sense for larger organizations.

Finally, you could build a dashboard from scratch using web-based technology, a *Content Management System* or application development tools. These options require a more significant investment, and are also more appropriate for larger organizations. ●

 For more resources,
see www.idealware.org/dashboards

Digital Asset Management

Many nonprofits manage a lot of digital assets, including photos, audio and video files, and PDFs. Digital asset management software helps organize, categorize and track data about these files—for example, setting permissions for certain files, managing rights and tracking usage—and allows a number of people to find and share files.

If you only have a couple hundred multimedia files and don't need to track complex information about them, free online tools like *Photo Sharing Websites* and *Video Sharing Websites* might suffice. Other sites, like Box.net or Smartbins (formerly Wonderfile), store and share any kind of file—they'll let you upload, share and tag files, but aren't likely to support complex organization schemes or track tons of data. Microsoft SharePoint is a more powerful, flexible option for internal file management, and is available at a discount through TechSoup. Many *Web Content Management Systems* also have useful functionality in this space.

There's a whole class of system dedicated to managing photo and video files, including Extensis Portfolio Studio and NetXposure's NetExpress. These tools help multiple people organize, share and track photos. At the top end of the market, sophisticated products like OpenText, KIT Digital, Virage MediaBin and Canto's Cumulus can cost tens- or even hundreds-of-thousands of dollars.

More concerned about tracking documents or a whole range of file types? You'll find sophisticated options for those needs, as well, often called *Document Management Systems*. ●



For more resources,
see www.idealware.org/dam

Document Management Systems

Is your organization drowning in a sea of documents? Document Management Systems can help you find and manage all the documents your organization uses, from staff memos and publications to invoices.

For small organizations with a reasonable level of document output, simply organizing the files and folders on your file server can provide a basic level of document management. Even adopting a naming system can make a difference—for example, naming a document “Jones Fax 05-13-08.doc” instead of “Jones.doc” is a rudimentary form of managing documents by making it easier to find them later. (Free search solutions like Google Desktop, Copernic and Windows Desktop Search can help find documents, as well.)

Larger organizations of 50 or more employees, or those with a particularly heavy document output, can benefit from a Document Management System (DMS) that provides searching, versioning, comparison and collaboration, workflow integration and metrics that reveal how your organization uses your documents.

For simpler needs, affordable Document Management Systems are often resold with photocopiers and scanners—primarily intended as image and PDF management systems, they can also manage files created on the network, and your organization may already have one. These bundled DMS’s, like Laserfiche, may not include the very high-end features offered by an enterprise-level system, but will offer the basics, and often come with very competitive, tiered pricing.

Microsoft SharePoint is another popular choice. Sharepoint integrates with Microsoft Office documents, and offers sophisticated workflow and routing features and extensive document- and people-searching capabilities. This powerful tool is expensive, but available to qualifying nonprofits for a low administrative fee through TechSoup, which offers both SharePoint Standard

Edition and Enterprise Edition. Another well known product, Alfresco, has a lot of the same strengths, but is free and open source. Both SharePoint and Alfresco require considerable setup time and some technical know-how.

For more money, but less work, a number of systems like KnowledgeTree or Questsys are geared specifically to support document management processes for mid-sized and larger organizations. At the high end of the market are a number of sophisticated systems designed for large organizations and corporations, including Open Text eDocs, Interwoven WorkSite and EMC's Documentum. ●

 For more resources,
see www.idealware.org/dms

Multimedia Editing

Multimedia editing software gives you the capability to create videos or Podcasts with a level of a polish that used to require a lot of expensive hardware. Good editing takes time and some skill, but a number of low-cost, straightforward packages put the tools within reach of any nonprofit.

With audio packages, you can edit interviews for length, cut “um”s and pauses, and add music or voiceover introductions. Both GarageBand (for the Mac) and Audacity are free, solid tools that provide all the functionality you’re likely to need.

Video tools let you cut out pieces you don’t want, splice different sections together, and overlay graphics and text onto your piece. You might join an interview with a constituent together with scenes of your program participants, and put a title screen and music at the beginning—and even upload the video to YouTube with a single click.

For Mac users, iMovie (free with the Mac operating system) is a great editing tool for simple movies. The free editing software available for PCs, on the other hand—like Windows Movie Maker and Pinnacle Systems’ VideoSpin—can be difficult to work with, and often imposes insistent front-and-center ads or confusing limitations on supported formats. The inexpensive Flip camera comes with reasonable free editing software. Alternatively, for friendly features very similar to iMovie, consider Premiere Elements (\$15 for nonprofits on TechSoup, or about \$59 retail),

If you’ve outgrown the low-cost options, or want to create more robust animations or special effects, Final Cut Express and Final Cut Pro provide logical stepping stones for Mac users, while Adobe Premiere is a popular option for both Macs and PCs. These products, all under \$1,000, provide all the power you’re likely to need—if you need more, consider hiring a professional video editor.

Once you've edited your movies, it's easy to get them up onto the web—see Video Sharing and Streaming for more information. ●



For more resources,
see www.idealware.org/multimedia

Want to Produce a Free, Easy Inspirational Video?

If you're looking for an easy way to turn your photos and even video clips into inspirational videos, consider Animoto. It helps you to upload your images and clips, lets you select some music, and then automatically turns them all into a music video style montage. If you don't like the first one it creates, you can just ask it to create another one—each one is different.

Office Software

Office software helps with the day-to-day tasks that keep an organization running, including creating and editing documents, spreadsheets and presentations. There are three primary options for nonprofits: Microsoft Office, Open Office, or an online package like Google Docs.

Microsoft Office is the default choice for many nonprofits. With its sophisticated feature-set, familiarity for many users and low price for most nonprofits through TechSoup, it makes sense for the majority of organizations. New features that let users edit documents online in Office 2010 add to its popularity.

But it's not the only game in town. The free and open source Open Office is no more complicated to install than Microsoft Office, with a feature-set and interface similar to Microsoft Office 2003—which is to say not quite as snazzy as Microsoft's newer releases. It also lacks some of Microsoft Office's very advanced features, but is a quite usable alternative—especially for a small, technically comfortable staff philosophically aligned with open-source tools. If you're upgrading from Office 2003, Open Office might even be an easier transition than the redesigned ribbon interface Microsoft introduced in Office 2007.

The third option is to not use installed software at all, but an online suite like Google Docs, Zoho or ThinkFree. Google's free tools provide a straightforward, friendly set of features to cover the core needs of business users, offering functional, if limited, features to create, edit and share documents. Zoho and ThinkFree (both around \$50 per year, per user) offer more advanced functionality, but neither provides the sophisticated functionality or features of Microsoft Office.

For most organizations, switching completely to online office software probably doesn't make sense, as the tools aren't likely to be sophisticated enough to make it worth the learning curve. But online tools can be tremendously helpful for documents that require a lot of input from a number of different people, and can be useful as supplemental tools for producing *Collaborative Documents*. ●

 For more resources,
see www.idealware.org/officesoftware

Online Surveys

Online surveys are a cost-effective way to deliver surveys, collect results, and possibly even analyze the data—all through one central package. These tools let you easily define survey questions and possible responses using an online interface, send constituents links to take the survey, and download response data. Basic survey features are available through some other types of systems, like *Integrated Online Systems*, *Broadcast Email Tools*, or such online form builders as Google Forms, Woofoo or Formstack, but a number of dedicated tools are available.

Some, like SurveyMonkey, Zoomerang, SurveyGizmo and PollDaddy, offer free options with limited functionality, or a surprisingly robust set of features for \$200-\$300 per year. These types of tools tend to provide considerable support for different types of survey questions, but typically only limited ability to analyze the results.

If you want to conduct larger-scale research projects, a more powerful survey package like Qualtrics, QuestionPro or Key Survey might be a better fit. These tools support more advanced question formats, survey logic and sophisticated data analysis starting at several thousand dollars per year. LimeSurvey, a free and open source tool, provides similarly advanced functionality. The more complex feature-set makes this whole class of tool more difficult to use without training—especially for those without prior survey-design expertise. ●



For more resources,
see www.idealware.org/surveys

Want to Just Ask a Few Quick Questions?

If these tools seem like overkill, consider Google Doc's Form functionality, which lets you easily create and post a form online for free. PollDaddy offers similar features to integrate a small poll into your website.

Page Layout

Page Layout is a solution that enables you to arrange design elements (like text, images, colors and lines) to create newsletters, posters, reports, invitations and other materials. Appealing layouts require graphic design skill as well as software, but good page layout software can make your job easier and put high-quality designs within reach of anyone willing to learn a few basics.

Straightforward projects like reports or text-heavy posters can often be designed in word processing applications (Microsoft Word, OpenOffice.org Writer or Apple Pages, for example). These tools offer more control over fonts and images than you might think, but lack the flexibility to handle multiple design elements, text flow and spacing, and don't offer complex professional printing options. Microsoft Publisher, part of the Office Professional package, offers more sophisticated control—it's also more straightforward than full-fledged layout software, but isn't nearly as feature rich.

Unlike word processing applications, professional layout software treats pages as a series of distinct elements, and lets you format, edit or rearrange them independently of one another. Feature-rich tools like Adobe InDesign (\$60 through TechSoup), Scribus (free and open source) and QuarkXPress can be used to design anything from posters and newsletters to full magazines, books or newspapers.

If you struggle with multiple columns, images and page numbers using a tool like Microsoft Word, professional page layout software can be a revelation. They'll also speed up the layout process tremendously. But the complex menus and tools make these packages difficult to learn. In many cases, you'll need a solid foundation in graphic design lingo to understand their terminology—investing in a good book, or taking a class, will get you on the right track. ●



For more resources,
see www.idealware.org/layout

Photo Editing

Digital cameras have put professional-quality photos within everyone's reach, but once you've got a high-resolution image, how do you prepare it for print or the web? Cropping—trimming an image to remove unwanted items or to isolate the subject—is often needed to make a photo look professional. Color correction—for example, boosting a washed-out photo's color, or removing red eye—can save a less-than-perfect image. And resizing can make an image the appropriate dimensions for the target media, and shrink file sizes to make websites load more quickly.

The right photo editing software can do all these tasks, and many more, but tools in this area are often a trade-off between power, usability and price.

Free tools aimed at the home user or small business, like Google Picasa, iPhoto, Adobe Photoshop Express, Pixlr and Picnik.com, are simpler to use than professional applications. Most provide plenty of functionality for simple image-correcting and cropping, but don't support advanced features like multiple image layers, or the ability to cut a person out of a background and paste them into a new location. Middle-of-the-road packages like Adobe Photoshop Elements or Paint.net add additional power, but also additional complexity. Aviary Phoenix provides impressive features in a free online tool.

Adobe Photoshop (\$90 for nonprofits through TechSoup) is the most widely used professional-caliber software in this field. GIMP, a free and open source program, offers many of the same features in a somewhat less-intuitive interface. Even tech-savvy users will benefit from some form of instruction on these packages, whether through a book, a class or one-on-one time with a graphic designer. ●

 For more resources,
see www.idealware.org/photoedit

Email and Calendar Software

Microsoft Outlook, Yahoo! and Google Apps are the most common email solutions in the nonprofit world, and both tie users' email and calendars together. While these tools may serve different purposes, the combination allows staff to easily share their schedules with each other.

Outlook is the client side of a client/server package from Microsoft. When paired with Microsoft Exchange, it becomes a feature rich application offering email, calendar and other functionality. This reliable choice is often familiar for users, and provides as much advanced functionality as you're likely to need. It's also inexpensive through TechSoup (just \$5 per user for Outlook, and \$45 for Exchange, though you'll need someone with technical know-how to set it up and maintain it). If you are considering using Exchange installed on your network, you can also get it as part of MS Small Business Server, also from TechSoup. (A number of organizations, including Microsoft, can provide a hosted version of Exchange for a monthly fee—a useful choice for orgs without IT staff.)

You'll also want a way to filter Spam—many choose to supplement Outlook's built-in Spam filtering with a desktop filter like Mailshell, SpamAssassin or SpamBayes, or one installed on the server, like Cloudmark. Other options include hardware solutions like Barracuda Spam Firewall, or hosted systems like Google Postini Services or Electric Embers' NPOShield.

Google Apps offers an increasingly compelling alternative to the Exchange-Outlook combination. This suite of tools includes email, shared calendaring and documents, and more, and is free to 501(c)(3) nonprofits. Though Outlook's features are more robust, Google Apps focuses instead on providing solid functionality to meet most typical user needs.

Administration is streamlined, easily supports information sharing, and has sophisticated built-in Spam filtering.

Other software packages like Thunderbird and Zimbra offer free, open source solutions targeted at email management for individuals. Optional add-ons provide calendaring functionality. ●

 For more resources, see www.idealware.org/emailandcalendar

The Name Game

You'll need to register a domain to use any organizational email tool. Using the same domain for your organizational email accounts (george@idealware.org) and website (www.idealware.org) is inexpensive, looks more professional, and is easier for people to remember than using free email domains like gmail.com, yahoo.com or hotmail.com.

Use an online **domain registrar** to see if a particular domain is available—NetworkSolutions.com is the most widely known example, but sites like GoDaddy.com, NameCheap.com and Gandi.net are cheaper—and purchase the rights to the domain for \$10 to \$20 per year. Someone with a bit of technical savvy can use the tools provided by your registrar to point your new domain to your email software package.

Virus Protection

Anti-virus software is the guard dog of the computer world. It protects against intruders in the form of hackers, viruses, worms, spyware and other threats. An unprotected computer or network leaves you exposed, but a combination of firewalls and anti-virus software will shield you from most Internet threats. Many vendors offer security suites that include both of these applications and additional protection, as well.

A firewall is a virtual barrier between your machine or network and the outside world. It guards against intrusions from hackers and malware, which is a generic term for the many different forms of malicious software. Firewalls work by monitoring both incoming and outgoing traffic, and by letting you restrict what gets in and out. A good firewall includes predefined settings that let common traffic take place unimpeded—otherwise, users need to approve every transaction, which would be both overwhelming and annoying. They should also enable you to white- or black-list specific IP addresses or hosts, approving or denying access on a permanent basis.

A firewall that runs in stealth mode makes the computers it protects invisible to hackers and similar threats. Higher-end firewalls also let you block pop-ups or banner ads, encrypt credit-card information, or protect passwords—features which may be useful to your organization. Newer versions of Windows include a built-in firewall, and Norton and Kaspersky both offer trusted third-party firewalls that are included in their Internet security suites. Many organizations opt to install a firewall at the network server level to provide perimeter-level security for all computers in the network.


Anti-virus filters protect against worms and Trojan horses, malicious viruses often spread as email attachments or by downloading or visiting certain websites. The majority of viruses affect computers running Windows operating systems rather than Macintosh or Linux, though that's not absolute, and you should install protection no matter what Operating System you choose to run.

Filters rely on manufacturer-provided definitions of known viruses. Because new viruses are constantly being created, a good filter must be regularly updated to stay current. Antivirus applications should offer real-time protection by monitoring machines around the clock, and by scanning in- and outgoing emails and attachments for viruses and quarantining any they find. Make sure the antivirus solution you choose will integrate with your email client if it's not web-based.

You should also be able to schedule automatic scans, which is especially helpful for an organization with multiple employees who might not all remember to run scans manually. Scheduling also lets the software regularly update virus definitions against all current-known threats.

In addition, you need to protect against spyware and adware designed to compromise privacy. Adware can send personal information to advertisers, and generate annoying popup advertisements that are a bane to users. More maliciously, spyware can monitor your online movements and send your personal information like credit card numbers and passwords to those who would misuse it. Anti-spyware solutions work like antivirus solutions by scanning hard drives and networks and removing or quarantining anything they find. Some offer real-time protection as well. They also depend on updated definitions, and should let you automate regular updates.

Standalone solutions for firewalls, viruses and spyware can be installed on each machine, but if you have more than a few, they can become difficult to manage. Security suites can cost \$30-\$50 per user per year, but can be configured and maintained from a central control panel, and are available from McAfee, Norton, Trend Micro and Zone Labs. Free solutions are available from Microsoft Security Essentials, ZoneAlarm Free Firewall, Malware-Bytes and Spybot Search and Destroy. ●

 For more resources,
see www.idealware.org/av

Web Analytics

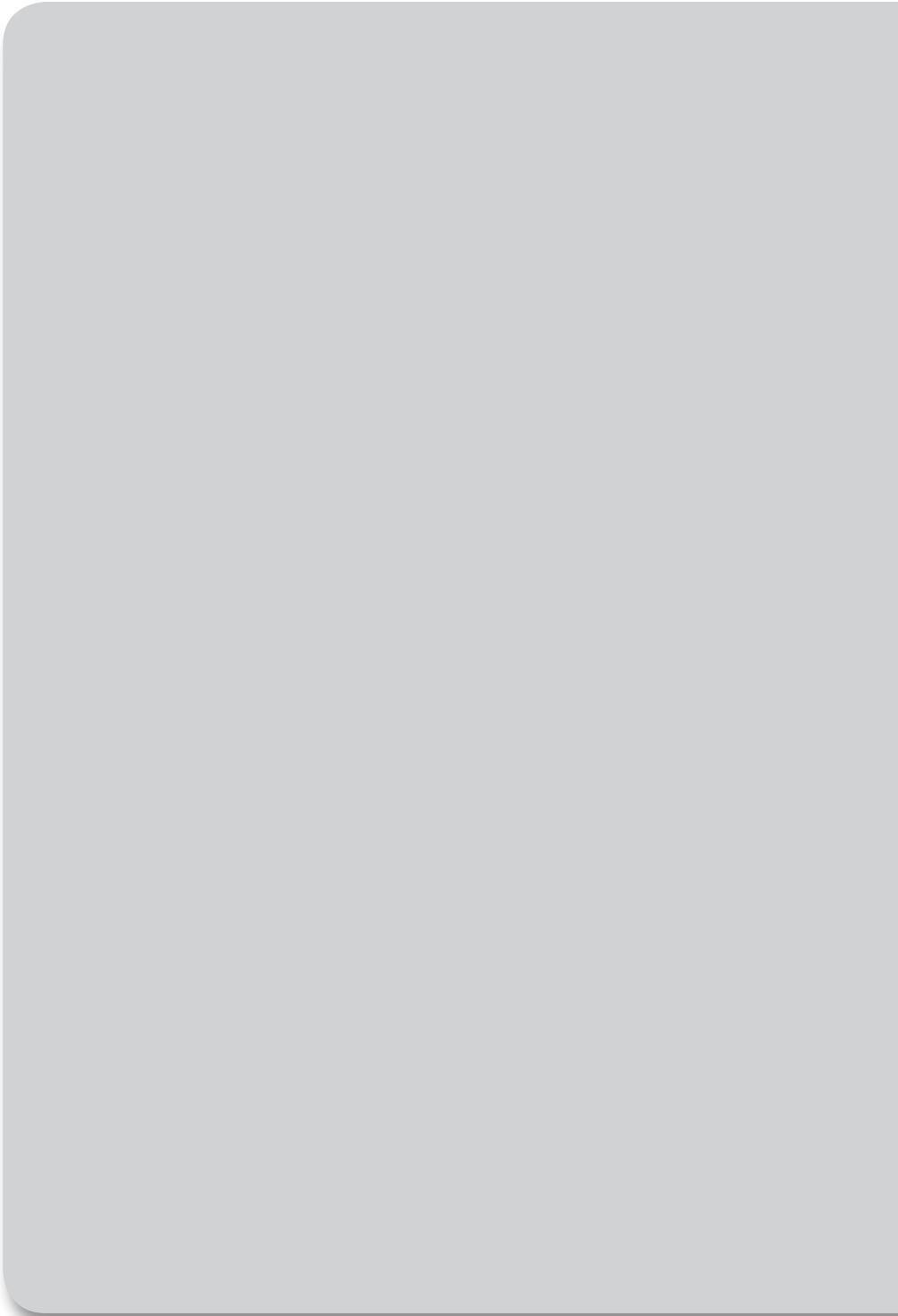
Web analytics software tracks your site's statistics—visitors to each page, what sites they came from, who they are and more—to help you understand and improve your website and readership. You may already have some of the tools you need. It's possible that the vendor you pay to host your website offers you access to some Web statistics through the same control panel you use to administer email addresses, check available file space and manage permissions. These tools (AWStats and Webalizer are common packages) offer basic reports with little in-depth analysis, but are a free, convenient way to get your feet wet with analytics.

Google Analytics is becoming more and more dominant in this space. It's free and widely used, and dramatically more powerful than any other free option. Getting started requires access to your website's HTML code, and at least a few hours of work—and more to track documents like PDFs or Flash content. You'll be able to see sophisticated metrics, analyze data across timeframes or pages, and set up the “traffic reports” you'd like to see. The powerful interface may overwhelm less tech-savvy users, but there are lots of books and training available.

A number of high-end analytics tools, like ClickTracks, WebTrends and Omniture, are particularly useful to track traffic behind a password barrier, or on sites with sophisticated multimedia content (which Google Analytics can't easily track). They also provide technical support, which Google Analytics does not. Prices vary, starting as low as \$25 per month and ranging way up to \$1,000 per month or more. ●



For more resources,
see www.idealware.org/analytics



Almost every nonprofit needs to coordinate the work of multiple people, from staff to volunteers to board members. Collaboration software can help you share information, hold conversations and manage projects, whether your teammates are in your office or around the world.

All of the software names highlighted within the text are covered in more detail in this guide. Most of them are included in this section, and follow immediately after the descriptions. If you're interested in a software type and can't find it in this section, you can look it up in the Index.

Even if you're a single-person organization, chances are you don't work alone—these tools can help you collaborate with colleagues, board members, volunteers and consultants.

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Strongly Consider...

File Sharing can help provide your whole team access to documents. For those tasks when you really just want to share information, not documents, however, *Collaborative Documents* might be a better fit for your needs, as they let multiple people work on a document at the same time.

With an *Intranet or Portal*, you can create a website internal to your organization to give staff access to reference materials and other critical matter that make it easier for them to work effectively.

Keeping Ahead of the Curve...

If you work with multiple people on multiple tasks and deadlines, *Project Management Software* can make it easier to keep responsibilities and accomplishments straight and help people understand their roles in the grander scheme.

If your staff or team members are spread out geographically, or if you regularly meet with constituents, volunteers or others, *Online Conferencing* can provide an easy way to facilitate meetings

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without the overhead and logistics of travel or accommodations. It can also make it possible to host trainings, Q and A's and another events.

Screencasting and Screenshots can also help with online trainings by creating images of your computer screen—or video recordings of your actions on the screen—to pass along to others by email or over the web. Screenshots can show how software looks, or is supposed to look, while screencasts can teach others how to perform certain actions.

On the Cutting Edge...

eLearning takes online training to the next level. With the right tools, you can create instruction modules rich with multimedia content to instruct students in an out-of-the-classroom setting. Such lessons used to require specialized course developers to design and create, but now they're within reach of anyone with the right tool and a good plan.

With *Online Chat*, people can type questions a website to communicate with an audience—say, your organization hosts a Q and A with an expert, and constituents can log on and see the questions and answers the moment they're typed, or ask their own.

If your organization has more complex needs than might be served by the more specific Intranet and Portal, Document Management and File Sharing solutions, a *Wiki* might be the answer. A user-editable website, a Wiki serves as a comprehensive, easy way for a large group of users—like staff or constituents—to create and share a growing pool of information.

Finally, growing in popularity in the nonprofit sector is the use of *Board Support Software*, a cohesive collection of tools and materials that enable members of an organization's Board of Directors to access, print and comment on board documents, take notes, and communicate among each other and with staff, keeping board members informed and engaged. ●

Board Support Software

Board portals are tools designed specifically to help members of organization's boards of directors fulfill their roles and collaborate effectively despite being spread out geographically. They also help staff deliver materials to board members, and expedite the flow of information among board members and staff.

New regulations in the for-profit sector that put stringent new requirements on board information and management led to the rise of these tools, which means they are first and foremost secure. But in the past few years, as their prices have come down and interest from the nonprofit sector has grown, vendors have adapted portals to better meet the needs of nonprofit boards.

Portals from BoardVantage, BoardWorks, Diligent Boardbooks, BoardEffect, Directors Desk and Thomson BoardLink all offer varied functionality, but many overlapping features.

Essentially, these products provide access to board materials and tools that help prepare for board meetings, and that make it easier to produce and manage materials and schedule work. Board members can take notes online as they review meeting packets, and access these notes during meetings.

Portals typically include tools to create a board book—the package of documents to be reviewed at a particular meeting—and centrally manage organizational documents, as well as the ability to broadcast materials to all board members, to a specific committee or to selected individuals. Board members usually have defined access to materials, with user-level access to allow support staff to see appropriate materials without access to confidential sections of the portal.

Other typical functionality includes on- and off-line accessibility that lets board members access materials over the web and download them for review while offline, such as when traveling, still ensuring the same strict security.

Most packages provide calendaring functions, and can link calendars to materials for scheduled meetings, as well as e-mail and discussion tools with confidentiality controls that limit access to appropriate staff. Some also include survey tools for polling board members or conducting board assessments, and let board chairs call for online voting, when appropriate. ●



For more resources,
see www.idealware.org/boardsupport

Collaborative Documents

If you've ever emailed a document to a group of people for comments—and then tried to revise the original with all their edits—you can appreciate the value of collaborating online. Each person can update the original document, and everyone with permission can view the changes in real time.

Collaborative Document tools tend to be inexpensive and easy to use. Google Docs is the best known example. It lets you work with an unlimited set of users on text documents, spreadsheets, presentations or diagrams, and you can invite them by email or set the document so that anyone with the link can login. (Users need a Google account to edit, but they're free and easy to create.) There's a helpful interface for users to manage the documents they have access to, but it's not great at dealing with groups—in general, you'll need to add each person individually as an editor to each document.

If you need more sophisticated formatting and features than Google Docs offers, Zoho and ThinkFree provide a more robust feature-set for about \$50 per user, per year.

Alternatively, many online *Project Management Software* packages like Basecamp or Central Desktop offer means to work together on documents or spreadsheets; if your group plans to work together over time, and to manage tasks, view shared calendars or share files online, a single tool that manages all these functions may make more sense.

To collaborate on complex documents, particularly one with a lot of different sections—like a set of documentation, or a book—a *Wiki* lets people edit existing documents as well as create new pages or sections. It's a collaborative website, not just a collaborative document, which provides more power to manage a great deal of content, but will also have a higher learning curve for collaborators. Once content is finalized, it can be downloaded in various file formats. ●



For more resources,
see www.idealware.org/collabdocs

eLearning

Want to teach staff or constituents over the web, or produce online classes? eLearning is an umbrella term for any instructional method that uses technology in place of a classroom, but typically refers to multimedia modules that teach students using interactive lessons. They can be delivered in real-time by an instructor, as in a webinar or collaborative presentation, or recorded and accessed on-demand. The latter is often a more cost-effective approach and works well for global organizations reckoning with multiple time zones. *Screencasting* tools are a lightweight way to create an interactive module, but many more robust tools are available.

Simple eLearning modules can include a few pages of text, with buttons to advance the pages and a short multiple-choice quiz to test for comprehension. More complex modules can include animation and immersive content, like teaching users a schematic and then quizzing them on its parts, or use branching logic to provide different course content based on how the student answers certain questions.

Tools like CourseLab, Adobe Captivate, Articulate, Lectora, ToolBook and SmartBuilder help develop the content and the interface with which students interact. These software packages will guide you through the creation of core elements like text, graphics and narration, and help add such embellishments as animation and interactivity that can engage learners and enhance the overall experience.

eLearning modules are often offered through Learning Management Systems, like Moodle, Blackboard, or other systems that offer both an LMS and a module creator. These systems help guide students through multiple modules and form learning communities. Modules can also be delivered in other common formats like HTML pages, Flash files or CD-ROM packages for kiosk use. ●



For more resources,
see www.idealware.org/elearning

File Sharing

Whether your colleagues are in the same room or on another continent, you likely need a way to create and edit documents as a team. There are far better ways than just emailing attachments back and forth.

If you want to share files with people in the same office, a computer that serves as a “file server” is a typical solution. A file server is simply a computer that acts as the primary place that staff can store and access their files. The server, and all the desktop computers, are then connected via a network.


For those who are in different geographic locations, *Collaborative Documents* such as the free Google Docs let users share documents over the web for a short-term collaboration between a limited number of users. All changes are saved and appear instantly to other users, avoiding the confusion that can come from passing around multiple versions of files.

Tools like DropBox, BeInSync, FolderShare and Microsoft SharePoint Workspace (formerly Groove) let users synchronize files on their computer with those on other machines. When the shared files are updated on one computer, the files are automatically synchronized on all other machines over the Internet, regardless of where each computer is.

Alternatively, SharePoint Services—which comes bundled with Microsoft Windows Server—lets users create project websites that let users upload files, “check out” documents so others can’t edit them at the same time, and share contact information. Or you could use a hardware solution like a Virtual Private Network (VPN) to create a secure way for remote users to access your entire network.

To share more information with a larger group, consider a *Wiki*, a website where users collaboratively edit a document using their browsers. *Content Management Systems* often offer file-sharing capabilities as well; if your organization uses a CMS for web content, consider adapting it for your other needs.

For very complex operations, enterprise-level *Document Management Systems* let users track document updates, store previous versions, check out documents to prevent simultaneous editing, and rigorously manage and search documents. ●

 For more resources,
see www.idealware.org/filessharing

Intranets and Portals

In addition to their external websites, many organizations have secure sites accessible only by staff. These internal sites, called intranets or portals, are widespread in the business world, and becoming increasingly common among nonprofits. (The word “portal” implies a somewhat more sophisticated site that brings diverse information together, but for the most part, it’s synonymous with an intranet.)

Sites used to share confidential organizational information, documents, reference materials and other resources, intranets can be built a number of different ways—including using the same *Content Management System* as your public website, or another one. You could also use a *Wiki*, which lets you create a relatively open and collaborative site that can be updated by staff.

Internal-facing social networking applications like Yammer can also let your staff quickly share status with each other—essentially, they’re internal tools that work similarly to *Twitter*.

Or you could create an organization-wide “start page” using an application like Google Sites or Netvibes for Enterprise. These tools let you add “widgets,” or small blocks of information, that provide announcements, links or information. Each individual user can then customize their homepage to add things like news feeds or weather reports.

As another option, tools like Google Sites, Backpack, Liferay or Microsoft Sharepoint provide a range of templates and features for document sharing, task lists, calendars, search functions, and *Blogs* and *Wikis*. If your intranet will support hundreds or thousands of documents, a *Document Management System* might be a better fit than lighter-weight solutions.

Whatever tool you use, keep in mind that an effective intranet is as much a matter of staff training and culture change as it is a technical one. It’s relatively easy to publish information for your staff; it’s considerably harder to help them find it, use it and keep it up to date. ●

 For more resources,
see www.idealware.org/intranets

Online Chat

Similar to instant messaging, online chat tools let people type messages into a website to communicate with an audience. The audience might be an entire group of people logged in to the discussion, or two people chatting directly. Online chat tools help organizations hold live online exchanges (like “chat with a celebrity” or “ask the expert” sessions), offer online client services with real-time responses, host a forum for comments during a live conference session, and more.

A number of free, straightforward tools support this, including Meebo, which lets you create a live one-on-one or group chat room on your own website. CoverItLive offers similar group chat functionality for groups or organizations that want to moderate chats. Another, Campfire, supports internal group chats, but can be adapted for public chat on your website. The more robust LivePerson allows real-time chat on your site, geared toward customer services. ●



For more resources,
see www.idealware.org/chat

Consider Twitter


Some organizations are using Twitter for Online Chats—especially to encourage comments via computer or text messaging during a live conference. If you ask people to use a “hashtag” (#) to identify their posts (for example, to include the keyword #DogLovers09), it’s relatively easy to group all resulting posts together for display via an LCD projector at the event, or on your website.

Online Conferencing

Technology has made it possible for the workforce to spread out geographically, but email and phone calls only go so far facilitating communication. Sometimes you need visuals to illustrate a conversation. Whether you want your audience all to see the same slides or document over the web, display your computer screen for a demo, or conduct more formal online seminars (often called webinars), Online Conferencing tools can help.

If all you need is the ability to do a video conference, Skype and Ooovoo offer useful and free audio and video conferencing for those who have a computer headset and a webcam. A handful of newer tools, including WebHuddle, DimDim and Yugma, are priced attractively—all offer limited free versions for small groups, and charge less than \$500 per year for fairly large groups. Audio and screen sharing quality with these tools can vary, however, and they can be less reliable than the more expensive tools below.

Tools like GoToMeeting, GoToWebinar, WebEx, Acrobat Connect and ReadyTalk cost more, but are more widely relied on and dependable. They often provide such features as integrated audio and visual recordings, integrated toll-free conference-calling lines, and other advanced interactive tools. Cost is often complicated to determine, as it's based on the features you want and the number of people in your meetings. It generally ranges from \$400-\$1,000 per year. ●

 For more resources,
see www.idealware.org/conferencing

Check on Audio Conferencing!

Note that the posted prices for these tools often does not include the cost of audio conferencing via a phone line. Some tools provide Voice Over IP, which provides free audio over the Internet, but that requires that all participants have computer speakers and computer microphones, as well as some technical know-how. Otherwise you'll need a telephone conferencing line. Online conferencing vendors will generally provide one – often at extra cost--or you can use a service like FreeConferenceCall.com. You can also arrange it so that participants call in using their own minutes or long-distance services.

Project Management

Managing projects can be confusing, especially with multiple team members—potentially in different locations—who need to coordinate tasks, documents and deadlines. There are a number of different types of tools that will handle a few pieces of this management puzzle, but unfortunately there's no such thing as a one-size-fits-all project management tool.

To create an overall project plan, with tasks, dependencies, time estimates and resource allocation, consider tools like OmniPlan or Microsoft Project. Microsoft Project, while popular and powerful, is complex and may be overkill for the majority of nonprofit projects.

Document sharing is another frequently mentioned project management feature. Specialist tools such as Google Docs or Zoho allow easy online file sharing. *Wikis* or *Collaborative Documents* can also provide useful document sharing for a remote team.

Organizations that need to track complex tasks—for instance, those that include conversations, priorities, attachments or software development issues—often use separate issue-tracking software like OpenAtrium, Jira, DoneDone, Unfuddle and Kayako. These tools are typically available for a small fee, from \$10 to \$25 per year.

There are also some useful free and open-source issue-tracking software systems, including Mantis, Bugzilla and Trac. You'll need to install these systems on your own web server, and maintain those servers yourself, which makes them a better solution for more technical organizations. Many companies use commercially hosted versions of these systems to eliminate the risk of tracking issues on the same server that runs their sites.

Many project managers would like a single system that handles all of these things. Unfortunately, there's no tool likely to include all the functionality of the sophisticated, specialized tools. However, a number of general project management tools like Basecamp, CentralDesktop, Zoho, DreamTeam for Salesforce or GoPlan incorporate basic project planning, document sharing, task management, shared calendars and online discussion boards. These web-based tools are particularly useful for geographically diverse teams, or for teams that include members from outside your organization. ●



For more resources,
see www.idealware.org/projectmanage

Screenshots and Screencasting

Sometimes it's more useful to show a group what you're talking about rather than just tell them. Screenshot tools let you do just that by capturing an image of your screen that you can share with others—typically in .JPG or .PNG format. Similarly, screencasting tools let you actually record or make a movie of what's happening on your screen. (If you want to share your screen in real time rather than as a recording, *Online Conferencing* software might be more useful.)

Most computers let you capture a simple screen image without additional tools. On Windows computers, the “Print Screen” button will copy your entire screen to the clipboard—or, press Alt + Print Screen to copy just the current window. From the clipboard, you can paste it into a document or *Photo Editing* software to see or edit it. On a Mac, hold down the Apple key + Shift + 3 to capture your entire desktop, or Apple + Shift + 4 to select a specific portion of the screen. Windows 7 comes pre-installed with a reasonably featured “Snipping Tool” that simplifies the process of screen capture.

Screenshots can be embedded in creative ways in PowerPoint presentations, blogs and websites. If you rely heavily on screenshots, look for a tool with more powerful options like TechSmith's SnagIt or Easy Screen Capture. These tools are both under \$50 and provide better control over selection areas—including scrolling screens and odd shapes—and let you apply effects like borders and drop shadows, highlight sections of the screen with arrows, or shade out unwanted areas.

Free browser add-ons offer more screen capture facility than is built in to Windows, but not as much as commercial products. Screengrab and Fireshot work for Firefox, and Screen Capture works for Google's Chrome. Because they are browser based, they function across platforms and will work on Windows, Mac or Linux machines.

Screencasts that walk users through a particular task, complete with voiceover, are helpful for online trainings or demonstrations. TechSmith's Jing offers easy to use, stripped down features in both its free version and inexpensive Pro version. The more expensive TechSmith's Camtasia and Adobe Captivate offer more power to edit video and synch it with audio. Camtasia offers features to pan and zoom around your screencast, while Captivate excels at adding interactivity.

None of these tools is particularly sophisticated in terms of video editing or interactive elements, however. *Video Editing Software* provides more flexibility for complex editing, and higher-end *eLearning* software offers more opportunities for animations and for viewer involvement. ●

 For more resources,
see www.idealware.org/screenshots

Wikis

A wiki is a web page whose content can be modified by multiple people. Administrators manage specifically who can see and edit sections or pages. Wikis are great for creating content collaboratively—they can be accessed online from anywhere, they let multiple people edit simultaneously, and prior versions are automatically saved and easily restored.

However, many wikis feel fairly technical to update. Staff members need to learn and use formatting tags—for example, [h1] to denote that a header should be large and bold. These tags aren't particularly complicated, but can be intimidating to less-technical users.

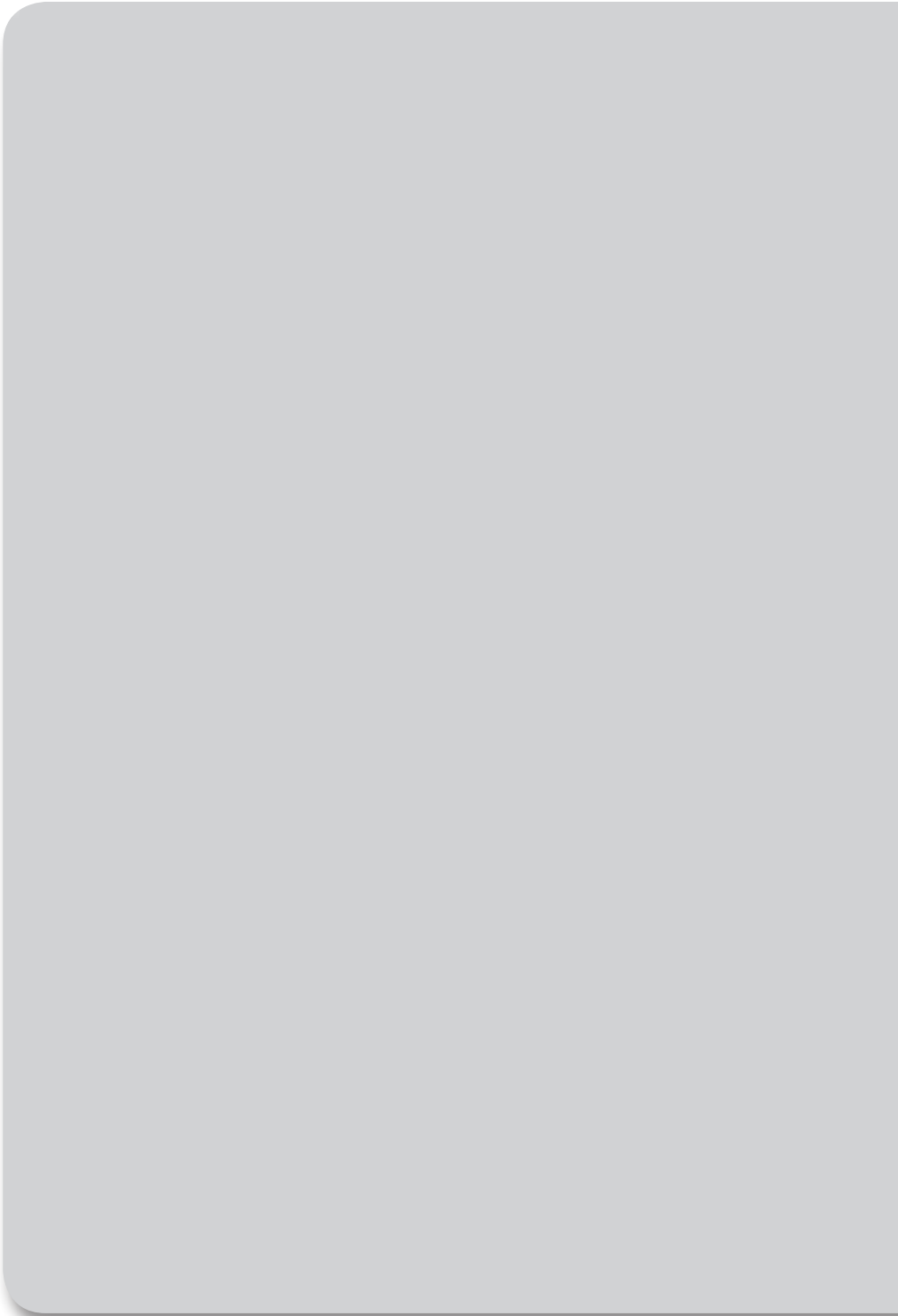
Those looking to get started quickly will benefit from hosted wiki software, which you can access over the web. PBworks and Wikispaces both offer free, basic hosted services, but taking advantage of all available features can cost \$500 per year, or more. Wikispaces is one of the few wikis that allows easy formatting without the use of tags.

If your organization is comfortable downloading and installing software on your own web server, there are a number of free and open source options, like MediaWiki (originally developed for Wikipedia), DokuWiki, and PhpWiki. Confluence, typically a fee-based product, also offers free licenses to nonprofits. ●

 For more resources,
see www.idealware.org/wikis

The Many Uses of Wikis

Wikis can be useful for creating or sharing information among a group—for example, as a collaborative website like Wikipedia, for project management or document development, to share best practices, or as an Intranet or Portal. If your constituents are spread out across the country or the globe, a wiki lets people keep pertinent data up-to-date in a central, easily accessible location.



You have constituents: donors, event attendees, volunteers, board members and more. You need a system to track them, and to store all the information you'll need to build your relationship.

What type of system will best help you depends on your specific needs. This section will help you think about what exists, and what might work best for you.

All of the software names highlighted within the text are covered in more detail in this guide. Most of them are included in this section, and follow immediately after the descriptions. If you're interested in a software type and can't find it in this section, you can look it up in the Index.

Every organization needs some way to track donors, event attendees, volunteers and other constituents, but which system type you choose requires some consideration. The different types available range widely in cost and features. When choosing, you need to carefully weigh the type of information that's most important to you, as well as how you plan to access and use that information.

The system types include:

- ***Donor Management.*** These systems provide targeted support to track donors, prospects, pledges, premiums and giving levels, matching gifts, and sometimes grants and corporate sponsorships. Some provide support for additional constituents, like event attendees, volunteers or members. However, these

systems are best-suited for organizations that hold individual fundraising as a top priority.

- ***Constituent Relationship Management (CRM)***. These systems are designed to track comprehensive data about each constituent—not only the donations and membership dues, but also, potentially, event attendance, volunteer work and anything else you might care to track about a particular individual.

These systems are not designed to specialize in any one specific function. Instead, they're typically flexible to let you tailor them to the processes you need to support. If constituents have complicated relationships with your organization, or tend to cross organizational boundaries—for example, program alumni often become donors—a CRM can be a useful way to get a full picture of each constituent.

- ***Integrated Online Systems***. These types of systems combine different online functions in a single package. For example, they'll often let you track donors and other constituents, send ***Broadcast Emails***, take ***Online Donations*** and ***Event Registrations***, and even manage a website, all in one system.

It can save you a lot of time and hassle to have all this data in one place, but make sure your other needs are also met—these online specialty tools often aren't as strong at helping with direct mail processes and donor list-generation tasks as ***Donor Management Systems***. To take full advantage of these tools, small organizations typically use them to replace any existing constituent databases.

- ***Association Management Software***. Generally synonymous with membership management, these systems track organizations and individuals as members. They tend to be strong at managing yearly dues, events and online member interactions. More advanced systems often also provide substantial donor management support, as well as functions like ***Broadcast Email*** and ***Online Payments***.

- *Case Management Software.* Case management systems will track the information you need to work with a client, such as address, job history, medical history and child care situation. They'll also track communications between your staff and the client, the individualized plan for your client, and the progress toward the plan, and let you report on all the information you've collected and maybe go so far as to support overall program evaluation.
- *Volunteer Management Software.* Do you work with a lot of volunteers, and track their hours, interests, schedules and contributions? If so, a system that can help with those tasks could be useful—it could even help you recruit people and collect information about potential volunteers online.

In practice, these types of software aren't as distinct as they might seem. For instance, some systems offer a lot of support for donor management, the ability to track members and volunteers, considerable flexibility to track other constituents, and some support for *Broadcast Email* and *Online Donations*. Are they Donor, Member, Volunteer, Integrated Online or CRM systems? It doesn't matter, as long as they meet your needs. ●

Association Management Software

Do you want to track your organizational members, dues schedules, member benefits, invitations to events and workshops and more? You might find an association management system useful. Association management is generally synonymous with membership management, though it tends to imply a larger system that tracks both organizations and individuals as members.

At the lower-end of the spectrum, less-expensive online tools like 123 Signup, MemberClicks, Yourmembership.com and Tendenci are likely to work best for associations with less-complicated membership and benefit structures. They range from about \$50 to \$300 per month, depending on tools and how many members you're tracking.

In general, solutions with mid-range pricing (typically, between \$3,000 and \$15,000 per year) offer deeper functionality and greater ability to configure the application to meet individual associations' needs. Hosted solutions—like i4a's Association Management System, JL Systems' Noah, GoMembers and Avetra's NetForum—tend to provide lower startup cost and implementation time, but are somewhat less flexible. If you need more flexibility, consider solutions that provide both systems and the consulting to tailor them to your needs, like Affiniscape Members360 and Euclid ClearVantage.

At the high end of the market, systems like CDC Software Computility, Advanced Solutions International iMIS, Oasis Computing Association Management System and Integrated Software Solutions IMPak target larger professional or trade associations that have the technical staff in place to adopt and sustain enterprise software. They offer complex association features, customized toolsets and stronger vendor support partnerships. In addition, higher end systems are designed to manage large conferences and provide members-only content like membership directories and protected web pages. Pricing for the software alone ranges from \$15,000 to more than \$100,000 in annual costs, and implementation generally ranges from \$30,000 up into the hundreds of thousands of dollars. ●



For more resources,
see www.idealware.org/assocmgmt

Case Management Software

Case management systems—sometimes called Client Management Systems—will track the information you need to work with a client, such as their age, address, job history, medical history and child care situation. They'll also track communications between your staff and the client, the individualized plan for your client, and the progress toward the plan, and let you report on all the information you've collected, maybe even including overall program evaluation.

Advanced case management systems can do even more, such as helping with workflow and scheduling. For instance, based on the information you enter about a client, they can recommend that your client meet with a dietician, help to schedule that meeting and send the dietician a reminder. They can also help to automate your billing processes, particularly if you need to bill government entities or insurance companies.

A number of systems are intended to work across a range of human service scenarios. At the lower-price end of the spectrum, systems such as Bowman Systems' Service Point, DSI's Client Track and Social Solutions' Efforts to Outcomes can provide substantial tracking ability at about \$5,000 to \$25,000 per year. Somewhat more expensive software like Service Xpert Suite by Unicentric or Evolv-CS by Defran can provide more power for more expense—about \$25,000 to \$50,000 per year. Large organizations will likely need to look beyond these tools toward more powerful and expensive solutions, a complex marketplace beyond the scope of this guide.

Those looking to integrate client information with data about their other constituents (like donors), or to support complex and unusual process, should also consider *Constituent Relationship Management* systems. These systems tend to be very flexible but provide less specialized client tracking functionality out-of-the-box. For instance, a number of organizations are adapting Salesforce for use in case management.

If your programs concentrate on a particular, widely recognized area such as homeless management, child care, health services, summer camps or legal aid services, consider tools geared specifically to your type of work. Ask other organizations doing similar work about the tools that they've considered. ●

 For more resources,
see www.idealware.org/casemgmt

Constituent Relationship Management

Constituent Relationship Management (CRM) systems let you manage all of the people your organization interacts with—everyone from donors and volunteers to activists, participants, media contacts, board members, vendors and more—in a single system. The ideal CRM provides a holistic, person-centric view of all the different ways each person is engaged with your organization, and lets you support all the different ways you reach out to new constituents and grow relationships with them over time.

The right software can make or break a CRM strategy, but what software you choose depends upon your needs. Some tools built specifically as CRMs—like CiviCRM, Salesforce, Microsoft Dynamics CRM and SugarCRM—support many different types of nonprofit constituents and processes. All of these systems are very flexible, but often need substantial customization before they can be effectively used. CiviCRM and SugarCRM are free and open source, while Salesforce provides up to 10 free licenses to nonprofits. Microsoft Dynamics CRM offers a substantial nonprofit discount – for larger organizations, it may be cheaper than Salesforce. All four systems typically require IT staff or consultants to get up and running.

If most of your high-priority constituents are in a specific area, however, you may be able to implement a CRM strategy more effectively by starting with a system that specializes in that area rather than a more general one. For instance, if fundraising is your highest-priority function, and the majority of people you track are donors or potential donors, look for a *Donor Management* system that can also meet most of your other needs. If you do a lot of online outreach and organizing, you might use an *Integrated Online System* as the lynchpin of your CRM strategy. Or if you're geared primarily around program attendees, build your CRM strategy around a *Membership Management* or a *Case Management* system.

What type of system should you use? If you need to track lots of disparate types of constituents in multiple, complex processes, a generalized CRM system might provide the most flexibility. But if the majority of your needs fall in a particular area—like donor- or client-management—you might start with a system designed for that area, and see if you can expand it to meet your other needs.

Don't discount the possibility of integrating multiple software systems together—for example, working with a developer to use programming interfaces, or APIs—to execute your CRM strategy through two or more connected systems. ●

 For more resources,
see www.idealware.org/crm

Thinking Through Your CRM Strategy

In practice, CRM often describes a software strategy and set of processes as much as it does a specific class of software tool. Start by understanding all the different types of constituents you serve, and the types of processes you use to reach and then serve them. What data are you currently storing about constituents (in databases, files or personal data repositories)? What else would you like to know? What type(s) of systems can help you pull all that data together to get a holistic view of each constituent?


Donor Management

Donor-management software provides specialized functionality to manage donors, gifts and prospects. Almost all of these systems let you easily log gifts and track contact information, giving history and notes. Most also allow you to mail-merge letters, create reports or query to generate lists of donors. More sophisticated systems offer considerably more functionality for tracking different kinds of gifts—for example, grants, online gifts, major gifts and planned gifts—and advanced features, but require more technical savvy from fundraisers and IT staff.

Increasingly, many systems include substantial functionality beyond core donor management. Some provide online payment functionality that could potentially replace *Online Donation* or *Event Registration* systems, and others offer some email functionality (though it may not be as robust as even inexpensive *Broadcast Email* software). Some donor-management systems move toward the realm of *Constituent Relationship Management*, providing reasonable functionality to track volunteers, event registrants or other constituents in addition to donors.

Inexpensive systems like Giftworks, eTapestry and DonorPerfect start as low as a few hundred dollars. Mid-priced systems, like Blackbaud's Raisers Edge and Talisma Fundraising (formerly Donor2), can cost well over \$10,000 to implement. At the high end of the spectrum you could easily spend \$100,000 or more.

Regardless of what system you choose, make sure you think through how you will integrate your donor data with other types of constituent data, as many donors likely interact with you in other ways as well. Can you import and export files from the database? Are there programming interfaces (called APIs) that allow a programmer to write integration routines? Does it make sense to use a very flexible system or a *Constituent Relationship Management* system that can track more than just donors? ●

 For more resources,
see www.idealware.org/donormgmt

Buying Additional Data about Your Donors

A number of different vendors augment the data you've collected about current and potential donors. This service, sometimes called "data appending," starts when you send the vendor basic information, like a name and street address—for a fee, they provide such additional public information as email addresses, more recent addresses or giving potential.

It's easy to buy nuts-and-bolts information like up-to-date email addresses, physical addresses, phone numbers or geographic coordinates (for mapping purposes) from services like FreshAddress, TowerData or Melissa Data. This can be a good way to get information to jumpstart an email- or phone-outreach strategy. Expect the vendor to match just a fraction of your list (perhaps 10-25 percent). Prices vary widely depending on the information you're looking for and the size of your list, but might range from \$0.15 to \$0.75 per matched name.

You can also buy more detailed demographic data to help assess donors' income levels, often called "wealth screening data." For instance, which donors live in a high-wealth Zip code, or own yachts? What's the assessed value of their houses (if that information is public)? What political contributions have they made? If you have a very large database, some vendors can even mine your own data to help predict your top prospects.

Wealth screening services like LexisNexis for Development Professionals, WealthPoint, WealthEngine.com, Blackbaud's Target Analytics and Prospect Research Online (PRO) offer multiple types of data, and many can provide information on either a single donor (through a web interface) or an entire list.


Integrated Online Systems

Integrated online systems let nonprofits manage both their web presence and different aspects of constituent information in a single online package. These applications can provide functionality to manage member, donor and other constituent data, accept online payments, send broadcast emails, manage event registrations, update websites and more.

Because they're combined into one package, there's no need to sync data between different components, which makes them compelling alternatives to multiple standalone packages. For example, instead of pulling data from both *Broadcast Email* and *Online Donations* tools to sync with your *Donor Management* system, all this information could be stored together in an integrated online system and accessed from a single place.

The downside is that they require more of an investment to buy and set up than individual components. And if you already have a *Donor Management* system in place, you'd need to transfer data to the integrated online system to take advantage of its functionality, a process likely to be fairly complex. These systems are also unlikely to be strong in every area they attempt to cover—look closely at each module to see how it meets your needs.

Prices for integrated tools vary dramatically depending on the number of constituents you track and the features and modules. Several tools, like Wild Apricot, eTapestry and Neon by Z2 Systems, start between free and \$50 per month to support a few hundred constituents, and go up from there. Tools like MemberClicks, DemocracyInAction's Salsa, CitySoft and Artez provide more features for somewhat higher expense. Antharia's OneFish offers an integrated toolset with consulting help to implement it. Top-of-the-market software like Convio's suite and Blackbaud's Sphere provides rich toolsets for sizable national nonprofits. ●

 For more resources,
see www.idealware.org/integrated

Volunteer Management Software

Do you work with a lot of volunteers, and track their hours, interests, schedules and contributions? If so, you'll want a system that can help with those tasks and maybe even help you recruit people and collect information about potential volunteers online.

It's important to think carefully, though, as to whether a system specifically devoted only to managing volunteers makes sense for you. Volunteers are frequently also donors, event attendees, or even clients as well, so tracking them in their own standalone system can create unnecessary data headaches.

Instead, it probably makes sense to look to *Constituent Relationship Management* (CRM) software, *Donor Management System* or *Online Integrated System* that can also track volunteer data. CRMs like Salesforce and CiviCRM are typically, by definition, flexible enough to track and report on many different kinds of data, including volunteer information. Alternatively, a number of *Donor Management* or *Online Integrated Systems* have modules with solid support for volunteer tracking—for example, Giftworks, DonorPro, Sage's Fundraising 50 and Fundraising 100, Raiser's Edge, Convio and Blackbaud Sphere. Some *Association Management* systems may also be flexible enough to track volunteer information

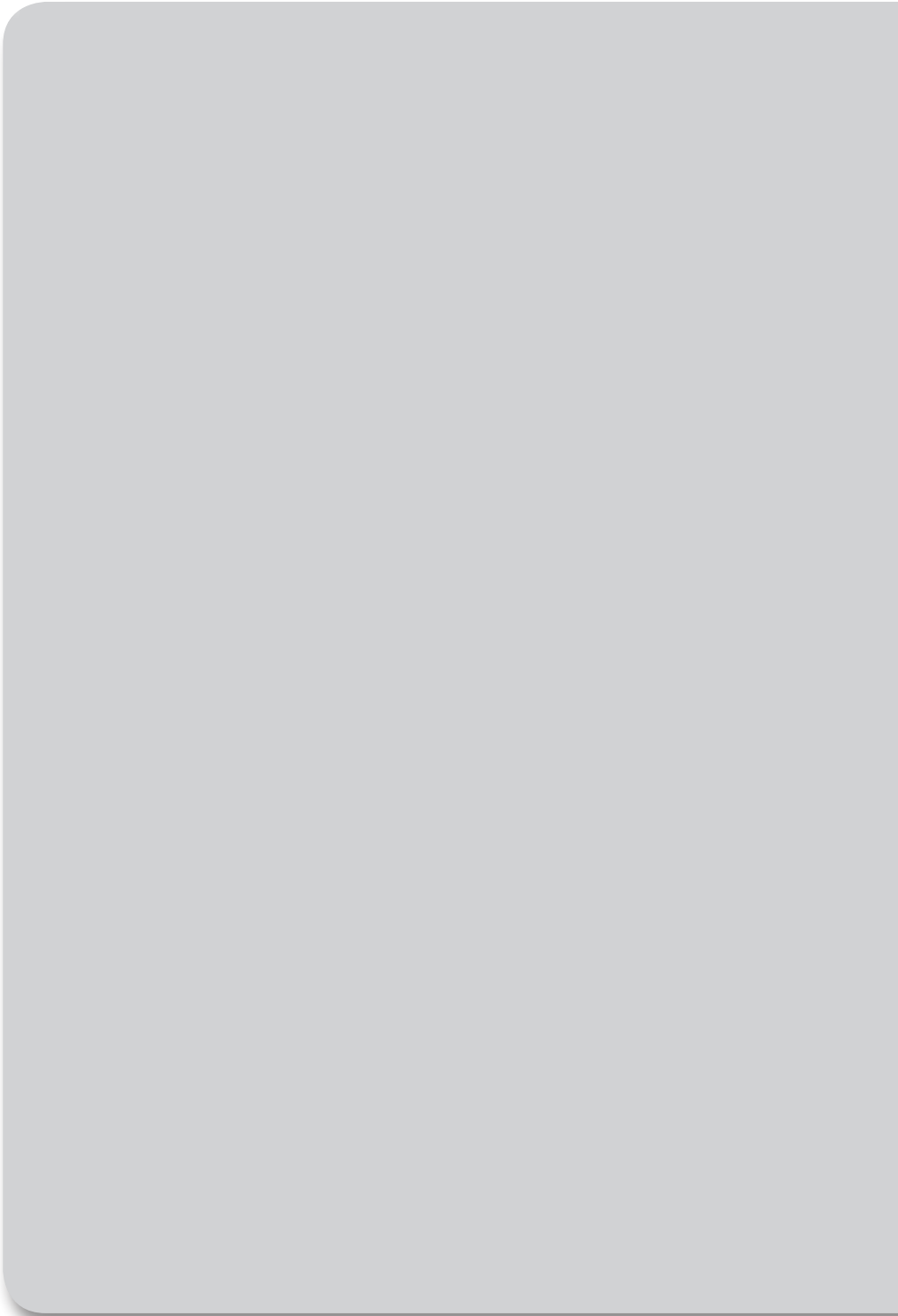
If you have very complicated scheduling needs, or complex recruiting processes, it's possible that a specific volunteer management tool like Volunteer2 or Volgistics will be helpful. These systems can track volunteer certifications, background checks, hours worked, and even assign time slots based on skills and availability (for example, who has a third-class driver's license and is available Thursday afternoons?). Make sure you know how you'll manage your data to consider your volunteers as potential donors or event participants. Otherwise, you've lost the ability to see all their interactions with your organization. ●



For more resources,
see www.idealware.org/volunteermgmt

Recruiting Volunteers Online

Want to put the word out that you're looking for volunteers? Online sites like VolunteerMatch.com and Idealist.org allow you to post opportunities to large communities of potential volunteers—they're essentially job boards for volunteers.



It's a fact of life: as a nonprofit, you need to raise money. Whether you're raising money from individual donors, grants, or through galas or conferences, software can make a big difference in how much money you can raise, and lower your stress level at the same time.

All of the software names highlighted within the text are covered in more detail in this guide. Most of them are included in this section, and follow immediately after the descriptions. If you're interested in a software type and can't find it in this section, you can look it up in the Index.

Whether your primary funding sources are individual donors or grants, fundraising is important to almost every nonprofit—and there’s a lot of software that can help.

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Strongly consider...

Most fundraising programs can benefit from an online component. To get started, you’ll need *Online Donation* software that lets you accept credit cards online, either for one-time donations or on a recurring basis. *Broadcast Email* tools facilitate the email outreach that can inspire prospective donors to give.

Enlisting major donors, foundations or corporate sponsors often involves a substantial cultivation process. An advanced *Donor Management* or *Constituent Relationship Management* system can provide such useful features as the ability to track specific foundation interests, create contact logs, generate call reminders and help guide staff through specific cultivation processes.

While you can use separate systems to manage donors, online donations and broadcast email, you’ll need to synchronize and integrate data between them. Many organizations find it useful to instead use a single *Integrated Online System* that manages all this information in one place.

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Keeping ahead of the curve...

Enlisting staff, volunteers or close friends to help fundraise is common practice. Several tools are available to help manage the logistics involved. *Friend-to-Friend Fundraising* lets supporters create their own online-fundraising web pages, and can support your organization in managing this kind of distributed campaign.

Social networking sites like *Facebook* and *Twitter*, as well as certain *Niche Social Networking Sites*, can also provide some aid in raising money through networks, though organizations generally find them more effective as outreach tools.

A good *Constituent Relationship Management* system can help track who's helping out in the fundraising effort, while *Email Discussion Lists* and *Custom Online Communities* can help your fundraising team coordinate with each other.

On the cutting edge...

A growing trend is to ask supporters to organize their own informal fundraising events—tools that support *House Parties and Meet Ups* can help coordinate the logistics. Large organizations have also begun to experiment with fundraising by *Mobile Text Messaging* campaigns which let donors give small amounts by sending a particular text message from mobile phones. ●

From fundraising galas and get-to-know-you gatherings to educational workshops and conferences, events are often an integral part of fundraising and marketing plans. The right software can help you promote and manage them.

Strongly consider...

In the weeks leading up to an event, you'll want to promote it, both on your website and through the outreach methods described in the *Reaching Out to New Friends* and *Engaging Current Supporters* sections. In addition, think through the various events calendars on which you could post the event—many existing online communities include calendars, and a *Web Content Management System* can help you create one on your own site. Social networking sites like *Facebook* can also help you post your calendar of events.

Event Registration software can be helpful both to track information about who's planning to attend an event, and to allow online payments for events with a registration fee. More sophisticated systems can also help manage details like meal preferences, name tags, workshop sign-ups, different pricing levels or even on-site registration. Some *Donor Management* systems, *Web Content*

Management Systems and *Integrated Online Systems* can help manage registrations, but they're typically not as sophisticated in this functionality as dedicated systems.

Many events also require some kind of printed pieces, including programs, schedules or organizational information. *Page Layout* tools can help you create professional and polished materials that best represent your organization.

Getting ahead of the curve...

Managing the logistics of a complex event can be daunting. Some *Donor Management* systems offer functionality to help manage events, but dedicated *Event and Auction Management* software can provide much more sophisticated support for tracking schedules, budgets, auctions, sponsors and all the other details that go into planning events. *Online Auctions* can add an interesting online component to your event, as well.

On the cutting edge...

At a large, live event, it can be interesting to let attendees post questions live and then project and view them online via *Online Chat* tools. These same tools can also be useful to facilitate live online chats with distributed audiences. ●

Event and Auction Management

Planning events and auctions involves a lot of logistics, including sponsors, budgets, schedules, seating and facilities. Some *Donor Management* systems, *Constituent Relationship Management* systems, *Member Management* software and even some *Volunteer Management Systems* can help with these tasks. It's useful to have this functionality integrated with other constituent management functions, but the features these tools provide is rarely as sophisticated as in dedicated packages.

Good *Event Registration* software often not only helps your attendees register online, but has event-management capabilities as well—for instance, to assign seats or manage schedules and rooms. Very high-end tools like StarCite and eTouches provide both event registration and sophisticated management capabilities with functionality designed help you to track complex logistics, speakers, rooms and budgets for huge events and conferences. It's very convenient to have management functionality combined with your online registration tool.

Live and silent auctions often require tracking particularly complex sets of information, including the items for sale, their fair market value, buyers and selling prices, plus the need to generate bills and receipts on-site within minutes of each sale. Dedicated auction-management packages like (GreaterGiving's AuctionPay and ReadySetAuction provide functionality tailored specifically to these needs.) ●

 For more resources,
see www.idealware.org/eventmgmt

Event Management, or Event Planner?

Keep in mind that no software will actually plan all the details for you—if your logistics become more complicated than what you can easily manage by yourself using mid-priced Event Registration software or an Excel spreadsheet, you might consider hiring an experienced event planner and using whatever software they recommend.

Event Registration

These days, people expect to be able to register for events online. With the right software, you can accept RSVPs, manage attendee information and accept payment, all online.

For simple RSVP-only needs, free tools like Evite, Eventbrite, Upcoming, or even SurveyMonkey or Google Docs forms, provide the ability to understand who's coming, with a little flexibility in how your registration form looks and what information it collects. The *Facebook* Events application is another interesting option if most of your constituents use the social networking website. Or, you could set up a form on your own website—a straightforward process using a module available with your *Web Content Management System*.

If you need to collect registration fees, PayPal, EventBrite or BrownPaperTickets can provide basic functionality with minimal fees. These tools all charge fees that generally come to about 2.5-4 percent of the transaction. A number of packages, including Click & Pledge, GreaterGiving, Formstack, QGiv, GiftTool or MemberClicks, support a variety of other transaction types in addition to events like donations and online-store sales.

More sophisticated tools like Acteva, 123SignUp, RegOnline and Cvent add support for such additional features as customizing registration page look-and-feel, multi-track conference registration, complex discounts, nametag generation, sophisticated reporting and more. Typical pricing includes transaction fees between 2.5 percent and 4 percent of the fee plus \$1-4 per registration.

A number of *Donor Management, Constituent Relationship Management* and *Web Content Management Systems* and *Integrated Online Systems* also support *Event Registration*. This is also a common function in *Membership Management Systems*.●



For more resources,
see www.idealware.org/eventreg

Friend-to-Friend Fundraising

Friend-to-Friend Fundraising, also called online distributed fundraising, group fundraising, team fundraising or widget fundraising, involves recruiting supporters—including staff members, core volunteers or passionate advocates—to fundraise for an organization. This technique can result in a lot of new donors, but since they're often personally connected to the individual fundraiser rather than the organization, they may not be as likely to participate in other programs, or to give again.

Many friend-to-friend fundraising tools, including FirstGiving and ChangingThePresent let potential fundraisers create their own personalized fundraising pages, and all offer a version that's free except for a percentage of donations. Pages can have customized pictures, text and easy links to give money online, and can stand alone or be associated with particular events, like walk-a-thons. Individual fundraisers direct their own friends and family to their pages and take donations.

Some tools also offer fundraising “widgets,” or “badges.” Widgets usually take the form of a small box—often with a logo, text and a “donate” button—that can be added to existing web sites, blogs or social network profiles, if you know how to copy and paste a snippet of HTML (the language of websites). WhatGives and SixDegrees.org both offer widgets for only a percentage of donations received.

More sophisticated tools also let organizational staff members easily oversee a campaign's progress or organize fundraisers into teams. Blackbaud Sphere Events, for instance, provide more sophisticated, though considerably more expensive, organizational support in a standalone package. A number of *Integrated Online Systems* and *Donor Management* tools also offer some of this functionality. ●



For more resources,
see www.idealware.org/f2f

House Parties and Meet Ups

House parties and meet ups are opportunities for committed supporters to host parties or similar events to raise money for you or your cause. With the right software, organizers can publicize their parties, while others who share their cause can search a central list of events being hosted in order to find those of interest. Participants can also RSVP, allowing organizers to get a count of who's coming.

These events empower supporters while making logistical planning easier for everyone involved, and get the word about events out to a wider audience.

You may already have a system that supports this functionality. A number of *Integrated Online Systems* provide reasonable support for house parties, and some *Web Content Management Systems* include house party modules, or let you straightforwardly add that functionality.

A few vendors provide standalone tools in this area. Blackbaud's Sphere Events and Convio's Personal Events offer fairly sophisticated support for organizing and tracking events in the range of \$1,000 to \$3,000 per year.

You can also use *Event Registration* software, or tools like Meetup.com or Evite.com, to allow people to simply publicize an event and receive RSVPs. These tools don't typically let you create a centralized look at the events specific to your organization, but you could create a central list on your website manually. ●



For more resources,
see www.idealware.org/houseparties

Online Auctions

Holding an online auction can be an interesting fundraising technique for a nonprofit, particularly as an adjunct to a live event. They work similarly to traditional auctions—potential bidders browse web pages to see pictures, descriptions and suggested prices for auction items, and bid by entering the amount they’re willing to pay. When the auction ends, the highest bidder wins the item.

Two companies dominate the nonprofit Online Auction software market. The first, MissionFish, works with the massively popular online auction site eBay to allow nonprofits to conduct auctions for little to no charge. Listings are available to anyone who searches eBay, which lets you take advantage of the huge audience, but makes it difficult to create a special event feel or to build community.

The other, BiddingForGood, is notably more expensive, charging about 9 percent commission on your items for the first \$20k of sales, and doesn’t use eBay, so your constituents are the primary bidders. But nonprofits will like the features that support “special event” online actions, such as more-customized pages, sponsor logos and a service to add commercial items like travel packages or sports memorabilia to your auctions on commission. ●



For more resources,
see www.idealware.org/auctions

Want to Combine On- and Offline Auctions?

Conducting an event which involves both on- and offline auctions can expand your audience. ReadySetAuction and AuctionPay (covered in Event and Auction Management) both provide functionality to integrate the two.

Online Donations


Online donation software allows you to easily accept credit card payments over the web. Almost all of these tools work the same way—a “donate” button on your website links to a donation form where donors enter contact and credit card information. The tool verifies and charges the credit card securely, and makes sure the money reaches your organization. Online reporting tools let you see what’s been donated and export the donation information to other databases.

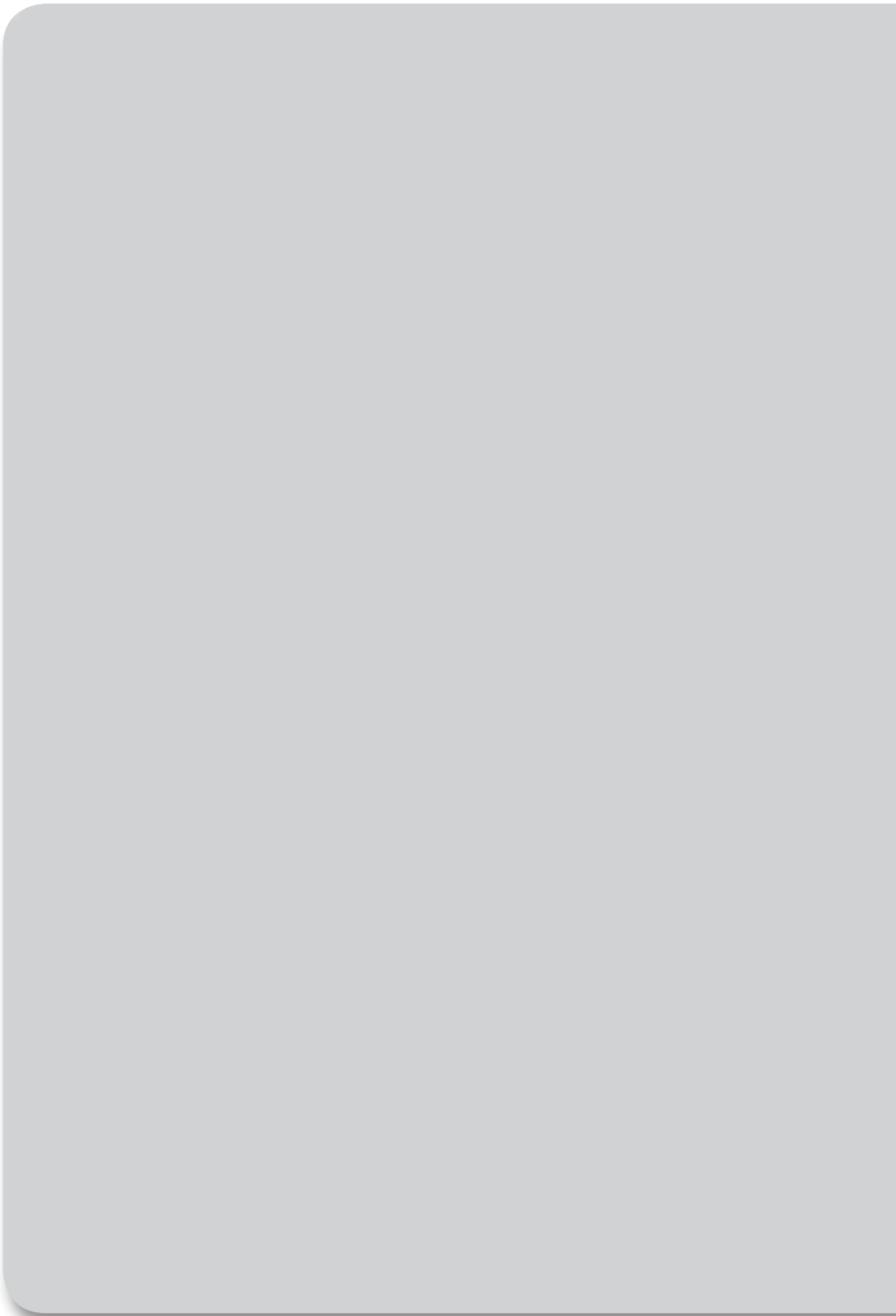
Many standalone tools can take online donations—in fact, many can also help with a number of different types of online payments, like membership or registration fees. If you’re just starting out, some tools—like Network for Good’s Donate Now Lite—charge no monthly fees, only charging you based on the donations you receive. Other tools like PayPal, Google Checkout and Amazon Payments are even cheaper, but less-specialized for donations than item sales.

If you expect to receive more than a few donations, it might make more sense to pay a monthly rate in exchange for a lower percentage fee, like \$20-\$40 a month for 3-3.5 percent. Tools like Click & Pledge, GreaterGiving, GiftTool, Network for Good’s DonateNow or QGiv are also more feature-rich, offering more support for different types of gifts, customized donation forms, and faster donation receipt.

If you’re interested in tools that enable supporters to accept donations for you on their own sites, consider *Friend-to-Friend Fundraising* tools. Or Dwolla will let you take payments via your *Facebook* page or *Twitter* posts.

If you use a standalone tool, you’ll need to export donor information into whatever system you’re using to manage donors, which can be a substantial process if you receive a lot of donations. Instead, many organizations use *Donor Management* or *Constituent Relationship Management* systems or *Integrated Online Systems* that support both online donations and the management of donor data. ●

 For more resources,
see www.idealware.org/donations



To build your base, you'll need to reach out to find new supporters, and then continue to communicate with them over time to deepen your relationships. Software tools can help. From software to help with traditional print outreach, like Page Layout tools, to cutting edge communications methods like Mobile Apps or online Geolocation platforms, there are tools to help any nonprofit.

All of the software names highlighted within the text are covered in more detail in this guide. Most of them are included in this section, and follow immediately after the descriptions. If you're interested in a software type and can't find it in this section, you can look it up in the Index.

Successful outreach to find new supporters, donors, volunteers, clients or other friends begins with an effective, compelling story. Start with the *Web Content Management System* and *Broadcast Email* tools covered in the Every Organization Needs section to communicate what makes your organization interesting.

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Strongly consider...

Printed postcards or brochures can effectively spread the word about your organization. *Page Layout* tools help you create these materials with a professional, polished design.

Your website can also be a strong ally in recruiting new supporters. A solid *Web Content Management System* can help you highlight interesting articles or resources that encourage people to talk about your organization, and make it easy for visitors to sign up online for more information. Make sure people interested in your cause can find your site using Google or other search engines using *Search Engine Optimization (SEO)* techniques.

A solid constituent management system is invaluable in tracking new constituents—whether as names on a direct mailing list, those that have signed up online, or people you’ve had direct contact with. A good software package will help you segment out the people you’d like to contact and track what outreach methods are working.

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Social networking sites like *Facebook* and *Twitter* can also provide interesting ways to reach out beyond your own network to your friends' friends online.

Getting ahead of the curve...

Getting people talking about your resources, cause or message is great—and better yet if they pass it on to their own networks. If you're lucky, your message will go “viral” and spread exponentially. While there's no guaranteed method to create a viral success, you can increase your chances by making sure your message is compelling and accessible online.

Your executive director, staff or subject matter experts might keep regularly updated Blogs. Consider creating *Petitions or Pledges* and asking your supporter to sign on, or posting your resources to *Social Content Websites* or *Video* or *Photo Sharing Websites*. *Podcasts*, regularly published audio or video programs, can also be interesting ways to reach a new audience.

Cultivating relationships with the media can be very useful. Establishing a “Press Center” on your website that centralizes press releases and makes your organizations' experts available for interview and other information can go a long way toward managing good media relations. A *Web Content Management System* will help keep a Press Center up to date and current, and a good constituent management system will help track all your media contacts.

Don't forget about advertising. *Online Advertising* possibilities offer affordable means for even small organizations to reach large audiences.

On the cutting edge...

Geolocation sites like FourSquare can give your physical location an online presence and engage visitors and attendees.

Friend-to-Friend Fundraising can also provide an interesting way to reach out to new donors, though it's unclear how many of these new donors are likely to continue supporting your cause (as opposed to supporting their friends) over time. ●

The right software can help you grow your relationship with each supporter and encourage them to help your organization in more and more important ways.

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Strongly consider...

Newsletters can keep supporters in the loop on your organization’s issues and actions. Printed newsletters are traditional and effective—*Page Layout* tools can help you create professional-looking templates that substantially ease the process of publishing each new issue. Many organizations now offer eNewsletters in addition to, or instead of, print newsletters. If you’re sending out an eNewsletter, *Broadcast Email* software helps you manage your list of subscribers, create your emails and view reports on their success.

Whether online or off, photographs can be a terrific way to make your activities come alive. Digital cameras make taking photos easy, but you’ll want *Photo Editing* software to help prepare them for print or the web. *Photo Sharing Websites* can also ease the process of distributing them to an audience over the web.

Optimizing your website so it can be viewed on a smartphone can help expand your audience, or you can take it one step further and create a separate *Mobile Website*. And as your website grows in sophistication, a *Web Content Management System* becomes even more critical for posting resources, toolkits or educational materials, or to create member- or volunteer-only resources to reward supporters.

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Get your supporters talking—with you, with each other, or both. *Email Discussion Lists* foster email conversations, while *Facebook*, *Twitter* and *Niche Social Networking Sites* are another way for supporters to stay in touch. Events can also be invaluable to gather supporters around your organization or your cause—for more information, see the Managing Events section.

Getting ahead of the curve...

The more frequently you can tell your story online, the better. *Blogs* provide useful forums for staff members, volunteers or those in the field to keep supporters in the loop about your organization's work. *RSS* can let supporters subscribe to your online content. Multimedia stories can be particularly compelling, if you have the time and skills to create them—*Multimedia Editing* tools help you create professional, compelling materials. *Video Sharing Websites* can help you share videos, while *Podcasts* let your supporters subscribe to your own radio or video “show.”

Don't underestimate the usefulness of engaging supporters by asking them to take action. Consider creating a *Petition or Pledge*, or *Supporting Online Actions*—ask your constituents to write letters, send emails or vote for something on your organization's behalf. *House Parties and Meet Ups* let them organize and publicize in-person events to support your organization or cause.

On the cutting edge...

If you already have a strong community, online tools can help you deepen and facilitate conversations. Consider *Custom Online Communities* to support your private community, or *Wikis* to collaboratively build a website together with those who share your organization's cause or interests.

Mobile Apps, downloaded onto smartphones, can be a great way to keep your organization on your constituents' minds, and *Mobile Text Messaging* is an increasingly popular way to reach out to groups of people—and more and more, to fundraise. ●

Blogs

Blogs are web sites where you post commentary, stories, links, or even photos, videos, audio files, or maps—often in a personal voice. Posts are shown in order by date, starting with the most recent. Subscribers can comment on what you’ve written, helping you to interact with your constituents and hear what’s important to them.

Blogs can be an interesting way to show your organization’s expertise and human side, but they only work if you’re able to post regularly. It takes quite a bit of effort to keep blogs fresh, and it’s obvious when you aren’t posting, so make sure you’re able to devote the time and effort to keep it going.

A number of software packages make creating and updating blogs quick and easy, even for non-technical users. Blogger, WordPress, Tumblr and TypePad, for example, are all commonly used and very affordable (Blogger, Tumblr and WordPress are free). WordPress.org and ExpressionEngine offer more advanced functionality for those with more technical expertise. Many *Web Content Management Systems* also offer some blogging functionality.

All of these tools let you set up a blog, customize its appearance, add links to important actions like donating or signing up for a newsletter, and then post text, photos or videos. All support reader comments, and let you moderate comments for inappropriate content or spam. These tools also let readers subscribe to your blog via *RSS* tools—an important functionality, since many people read blogs solely via *RSS*.

Most tools also support multiple bloggers, which can help share the expertise of your staff or volunteers, and help keep the blog fresh and interesting. More sophisticated blog tools like WordPress and Movable Type, and *Web Content Management Systems* like Drupal, let you manage complex blogging workflows—for instance, setting a central administrator who approves posts written by multiple bloggers—or integrate blog posts into larger websites in sophisticated ways. ●

 For more resources,
see www.idealware.org/blogs

Broadcast Email

Broadcast Email software lets you email a group of people all at once—as many as you want. It also helps you create attractive emails (often through graphic templates), manage email address lists, and let people subscribe and unsubscribe by themselves. In addition, more advanced tools help you collect email addresses on your website, “mail-merge” information into emails, send messages to particular segments of your mailing list grouped by demographics, and report on how many recipients opened or clicked on each email.

Vertical Response is a good option in this area, offering nonprofits a sophisticated feature-set and up to 10,000 emails for free. Network for Good’s Email Now is also feature-rich and attractive at about \$30 per month for up to 20,000 emails. Other options include Constant Contact, Campaign Monitor, Topica, MailChimp and iContact. WhatCounts provides compelling premium services targeted at those sending hundreds of thousands of emails a month.

Note that many *Donor Management, Constituent Relationship Management* systems and *Integrated Online Systems* provide some broadcast email functionality. While few can match the advanced features of dedicated software, you may find that your existing software meets your needs. ●



For more resources,
see www.idealware.org/email

Take Care with Installed Packages

If you email more than a few dozen people at a time, use an off-site vendor that supports mass emails. Tools like Outlook aren’t designed to support large-scale mailings, and won’t help with the formatting and list-management tasks critical for large lists. When you use them to email hundreds of people, you may reach more Spam filters than inboxes—or worse, your mail server might be blacklisted as Spam, blocking any future email from anyone in your organization.

Charts, Maps and Diagrams

There's a reason people say pictures are worth a thousand words. Graphical depictions of data or processes can convey the main message and a host of supporting information in a single glance—in a way most audiences will find unthreatening, interesting and easy to follow.

It's often useful to create charts to represent data in an understandable way. Microsoft Excel, SmartDraw and DeltaGraph provide powerful functionality to create printed charts—and they're all under \$200 for nonprofits. Google Docs Spreadsheet, ManyEyes and Swivel provide tools geared toward creating interactive online charts—inexpensively, or even for free. These online tools, however, offer considerably less power to create charts that are substantial enough for printed publications.


Maps are also useful to geographically represent points or trends. Both Google Maps and Google Earth provide free and robust functionality to plot points on a map (for instance, to show clusters or gaps in services). Google Spreadsheet or BatchGeo can help you load a whole spreadsheet of addresses rather than plotting them one at a time. Google Maps provides two-dimensional views. Google Earth provides three-dimensional abilities to “fly” around your map, and adds abilities to raise and lower drawn shapes—and potentially, adding more data visualization possibilities.

Microsoft MapPoint—available to nonprofits for \$12 on TechSoup—is a powerful mapping program that lets you analyze data by geographic region, all the way down to the county, Zip codes or U.S. Census tracts. It specializes in “heat maps”—maps that color-code different regions according to your data.

If you'd like to create diagrams that are not specifically based on data, Visio, Gliffy, SmartDraw or OmniGraffle can help by providing pre-defined shapes and templates for diagrams like flowcharts, org charts or user interfaces. It can also be useful to create free-form “mind-maps”—using tools like Mindmeister,

Personal Brain or FreeMind— that show the relationships between ideas or information in summary format and between parts and wholes. For example, a mind map can be used to represent the objectives and strategies or components of an organization, program, or campaign.

Prezi also provides an interesting, interactive diagramming and presentation tool that allows you to layout all your information in one large view, and then zoom in and out to focus on different areas. ●

 For more resources,
see www.idealware.org/chartsmaps

Collaborating on Diagrams

Want to work together with a group on creating or analyzing a chart or diagram? Swivel Business provides functionality for a group to collaborate on charts, while Glify and Google Docs' diagramming tool allows group members to create or update diagrams and flowcharts together in real time over the web. VoiceThread takes on collaboration and commentary in a different way— it allows anyone to make remarks on almost any form of media (including diagrams, charts, drawings, photos or video) via audio overlay, video popup or text box.

Custom Online Communities

Want to provide a way for committed constituents to connect with each other for discussions and to share information? With custom online communities, you set up an online space and invite constituents to join.

One common approach is to use a custom social network tool. These packages let you set up an online community similar to *Facebook*, but just for your supporters. You create your network from a template, customize the site's look and feel, and choose features and functionality—including discussion boards and email options, events and calendars, and libraries of documents, videos and pictures. Members create profiles to view, post or interact with the site. Ning, KickApps and Groupsite offer free, ad-supported custom social network software, or inexpensive ad-free options. More tech-savvy organizations should also consider Elgg, a powerful free and open-source software package you download and host on your own web server.

There are other options, too. For a group whose members are already familiar with each other, *Project Management Software* like Basecamp or Central Desktop allows for straightforward file sharing and the ability to host shared conversations. Other options include *Wikis* or online discussion forums (also called bulletin boards), supported through tools like vBulletin and phpBB.

Whatever method you use, there are a few things to keep in mind. Custom online communities take a lot of effort to develop and maintain—are your constituents really going to be eager to join yet another online community? Can you afford the staff time to seed and grow your community? Consider starting your community with an existing *Social Networking* site, *Email Discussion List* or in-person events to make sure you have an audience ready and eager to interact with each other in your new online community. ●


 For more resources,
see www.idealware.org/communities

Email Discussion Lists

Email discussion lists, often called “listservs” for the original software application that supported them, let people subscribe to topic- or group-oriented discussions. When a subscriber emails a specific automated address, the message is emailed out to all of the list’s subscribers. Other subscribers respond, and an ongoing discussion unfolds in inboxes. As email is familiar to a wide audience, email discussion lists can be a straightforward way to encourage people to talk to each other online.

Most of these tools let people subscribe or unsubscribe, decide whether to receive messages as they’re sent or in digest form to cut down on emails, and choose to view messages either via email or in a web interface. Most let users search archives online. Administrators can moderate emails, and more advanced tools let you customize the graphic design of the interface and more easily integrate the email addresses with your other databases.

Both Google Groups and Yahoo! Groups offer basic discussion list functionality for free, but include prominent ads in the email messages. Electric Ember’s NPOGroups offers similar functionality without the ads, and Groupsite adds a bit more power for a little more cost. GoLightly is more expensive, but very versatile, and offers such additional functionality as blogs, wikis, libraries and video. ●

 For more resources,
see www.idealware.org/discussion

Do You Already Have a Tool?

Donor Management, Constituent Relationship Management and Website Content Management Systems often include email discussion list capabilities. Your web hosting providers may offer Mailman, a basic discussion list package, for free. Both Custom Online Communities and Social Networking Websites can also provide some of this functionality, though they tend to support online conversations better than they do email discussions.

Facebook

Facebook is the largest and fastest-growing *Social Networking Site*, and it's taken root in a way that's made it nearly impossible to ignore. It began as a way for users to communicate with a select group of people they chose to add to their networks, and six short years later it's become a nearly indispensable utility for a core portion of the population, with more than 500 million users.

You create a page for your organization (formerly called “fan pages,” these are now just called “Pages,” but remain widely referred to by their old name) and invite current or potential constituents to “like” your Page. You can then promote events, host discussion boards or solicit donations there. Your updated information is likely to be seen not only by the people who directly “like” your page but by some of their friends, as well, allowing new people to find out about your organization without substantial effort.

You can also target updates geographically, or according to language or demographic criteria. For example, you could publish a message that would only be seen by your male, Spanish-speaking followers in the U.S.

Essentially, Facebook can foster discussion and get people talking to each other and to your organization. The site provides an interesting way for organizations to keep people up to date on events, cause-related information and news links, and can offer a means of sharing videos and photos as well. It can also be useful for marketing events and gatherings, and when people RSVP online, their friends can see it, helping to spread the word. Facebook also offers a nonprofit-specific application, Causes, which helps you start petitions, spread awareness and fundraise for particular causes.

With Facebook, as with all social media, results will vary widely among different organizations. You should consider your audience and your mission, as well as how much time you'll be able to invest, when creating a social media strategy. ●

 For more resources,
see www.idealware.org/facebook

Geo-Location Applications

If your organization has a public physical location, like a museum, or does a lot of on-site advocacy or volunteer events, geo-location tools can be an interesting way to engage constituents. These social networking applications track users' physical locations—often using the GPS chip in their smartphones—and lets them “check-in” to places to let others in their network know where they are.

Foursquare is the early leader in this area, although *Facebook* recently released its own version, called Places. Other applications, like Gowalla, Brightkite and Loopt, work in similar ways. The idea behind these tools is relatively new, and organizations are still experimenting to see how—and whether—they can be useful.

With Foursquare, you enter your organization's venue into the application and people “check-in” via their phone when they arrive. Foursquare then tells your friends where you are, spreading the word by mobile text or on *Twitter*. The person who checks into your venue most frequently becomes known as the “mayor” of that venue, providing additional incentive for people to check in. Additional possible uses include offering discounts to the current mayor or to all who check-in during a specific time frame, or showing photos on your website of everyone who checks in. Or you could treat users who check-in frequently as super-activists and engage them to spread the word further.

Regardless of the application, the hope is that getting people to check in could boost attendance and awareness of your location among their friends, increasing your own audience.

There's a lot of public conversation about the privacy issues posed by applications that reveal location, but such concerns have much more important implications for individuals than for organizations. ●



For more resources,
see www.idealware.org/geolocate


Mobile Apps

An increasing number of your constituents are likely using smartphones or tablet computers. These devices let them browse the web and download mobile applications, or “apps,” for more interactive functionality. You might consider creating an app to engage constituents or provide them with useful information. In some cases, they’ll even pay for the privilege. Staff and volunteers may also use them to carry out organizational work.

The growing number of competing phones creates a challenge, because apps are platform-dependent—those designed for iPhones won’t run on BlackBerries or Droids, and vice versa. You need to either make educated assumptions about your users and desired audience, or build multiple apps for competing platforms.

Free apps still dominate the marketplace, but users have shown a willingness to pay a few dollars apiece for apps that manage to be both useful and cool. And that’s the challenge—for an app to be popular, it has to be useful. This sounds like common sense, but there’s no shortage of businesses creating apps for brand dissemination that don’t add any value.

If you have programming knowledge, tools like Cascada and Iceberg let you create Java-based apps for cell phones. And while there are a few tools—like AppMakr, Sweb Apps and MobBase—that allow non-technical users to create very simple mobile apps, for the most part, creating a mobile app will require a programmer. ●

 For more resources,
see www.idealware.org/mobileapps

Mobile Text Messaging

A huge percentage of households—93 percent in mid-2010, according to the International Association for Wireless Telecommunications—have cell phones, making it increasingly desirable for nonprofits to reach out via cell phone text messages—also known as SMS or Short Message Service.

This doesn't have to be expensive. In fact, you can send an email that shows up as a text message, by emailing their phone number at their service provider's domain (i.e. 2072088172@verizon.net). This isn't officially supported, so isn't likely to work for a large volume, but it's an interesting option to simply reach a few people. Mozes also supports inexpensive texting through an online interface, starting at \$10/month to send 250 messages. BulkSMS allows you to pay per text message, at about \$0.05 per text.

There are a number of online tools that provide more robust services, including the ability to send text messages to targeted sets of subscribers, collect data, provide interactive responses, and manage subscriptions and unsubscriptions. Vendors, including MobileCause, Mobile Accord, Mobile Commons, and Distributive Networks, provide services with interfaces conceptually similar to Broadcast Email Tools. MobileCause offers limited functionality starting at \$69/month; the others typically start at about \$250/month.

Most of these services also support mobile giving, which allows subscribers to donate either \$5 or \$10, added directly to their phone bill. It's not currently possible for them to donate more than \$10 at a time, and you'll need to wait until the subscriber pays their phone bill—perhaps months—to receive the money.

Options like Clickatell or MBlox offer services via application programmer interfaces, making it straightforward for a programmer to pull texts into or out of a database. AED's Gather tool provides specialized functionality in this area, with a tool to collect data via mobile forms and transmit it to a central database.

There's a number of free tools—such as Kannel, Gammu and FrontlineSMS—that allow you to connect your own cell phone to your computer (or if you need to support larger number of texts, you could connect a GSM modem to your computer instead of a cell phone) to send bulk text messages. This is a free, robust way to send texts especially in developing countries, but US carriers frown upon the practice, and are likely to shut down your account. ●



For more resources,
see www.idealware.org/text

Get the Code

For people to subscribe to your list, donate, or respond to survey questions via their phones, you'll need an identifying "short code"—many vendors assign you short codes with a keyword specific to your organization. For instance, people might text "SHELTER" to the short code 5634 to subscribe to your list. You can also purchase a custom short code, but at considerable additional expense.

Mobile Websites

More and more people these days are browsing the web with smartphones or tablets, and with the smaller screens found on these devices, websites need to be optimized to be useful. Designing a website to work well on mobile devices isn't as hard as it might sound.

Smartphones will show almost any website, but some look better than others. Because phone screens are typically portrait-oriented—vertically tall—while computer monitors are typically landscape-oriented, typical websites tend to require left-to-right scrolling. The top left corner of your web page is a crucial place to place navigation elements to allow mobile phone users to easily browse.

Some tweaks to your existing website might provide enough support for your mobile users, but you could also consider creating a second, simplified site streamlined for mobile phones. Free of animation or design elements that might not work on phones, this site would be a pared-down version of your regular site that scrolls vertically. For an example, compare <http://m.ebay.com/towww.ebay.com>.

Rather than requiring people to remember a separate mobile web address, you can include instructions in the coding language that try to automatically recognize when users are viewing the site on a mobile phone. This is less than 100 percent reliable, however, so it's a good idea to also include a link on your site that says, simply, *View our mobile site.* ●



For more resources,
see www.idealware.org/mobileweb

Niche Social Networking Sites

Social networking websites are free online communities where supporters can easily keep up to date on your organization and, in most cases, “talk” with you and other supporters. The most popular are *Facebook* and *Twitter*, but there are many others which tend to be more niche-oriented, focusing on particular groups with a specific set of interests. This is how they compete on the market—and exactly why they may be useful to your organization.

LinkedIn falls somewhere between social networking for the general public and a niche site. Targeted at professionals interested in networking, it’s likely to be of particular interest to groups whose mission is to support people in their jobs or who have a focus on networking. A LinkedIn profile is essentially a resume; users can link them to other people they know, and then see their profiles and all the people to whom they’re linked. In the business world, people frequently use LinkedIn to search for jobs or to locate resources for jobs or projects.

But it also provides an interesting way to look for connections to people your organization might want to meet. Organizations can create LinkedIn groups where hosts or members can hold discussions, post resources of interest, or create a job board. Members can also ask questions posed not only to group members, but to their contacts as well.

There are hundreds of more specifically targeted niche social networking sites to choose from, ranging from BlackPlanet (targeted at African-Americans) to Fuzzster (for pet lovers) and The Boaters (for boat enthusiasts). They vary widely in functionality, but all let you read posts that show what people in the community are thinking about, pose questions and make comments.

MySpace was designed to be of general interest, similar to *Facebook*, and the two were equally popular a few years ago. That’s all changed. *Facebook* has grown in popularity in a way few could have imagined, while MySpace has seen a substantial decline. Fewer organizations are investing much time in it, and those that do are seeing decreasing benefits. However, MySpace has a large emphasis on music and musicians, and today can essentially be considered a niche site with a focus on music. ●



For more resources,
see www.idealware.org/nichesocial

Online Advertising

Online advertising lets you advertise your organization or mission through other people's websites. Some sites limit you to text ads, while others let you run banner ads—usually an image limited to a particular size, though animation and interactive banner ads are sometimes possible. You typically pay for ads by “impression”—the number of times the ad shows on a site—or by “click”—the number of times any user clicks on the ad.

Google AdWords are a common, cost-effective method. You create a short text ad and choose the keywords and geographic area you'd like to reach, and Google posts your ad next to searches for them. Google provides easy-to-use tools to track your results and further optimize campaigns, making it straightforward to manage. Cost depends on the popularity of the keywords you choose, but often starts at just a few cents for each user who clicks through to your site—and you can cap the amount you spend per day. Even better, qualifying nonprofits can get up to \$10,000 per month in free Google AdWords advertising through the Google Grants program.

Facebook also supports online ads similar to Google's for a similar price. Advertisers have the option to create either text- or image-based ads, and pay either per-click or per-impression. They also let you target a number of different demographics. *Facebook* charges a \$1 per day minimum in the U.S.

Many *Blogs* and websites also accept ads, a good way to target a particular niche audience. Companies like Blogads facilitate advertising across a number of different sites. These networks typically let you search for *Blogs* and websites by demographic, audience size and prices. Prices vary depending on the blog, placement and duration, but start as low as \$15 per site for less-known sites. ●



For more resources,
see www.idealware.org/ads

Online Listening

Online listening tools help nonprofits “hear” what people are saying about their causes or organizations online. Whether they’re saying good things about your programs or questioning your methods, knowing what they’re saying and who’s doing the talking can help you fine-tune your plans, consider future actions, and prepare appropriate responses.

A number of online listening tools require you to actively search. You type in a keyword, such as your organization or executive director’s name, to find online discussions, conversations or mentions. Different tools are distinguished more by what online areas they search—for example, the entire web, a specific *Social Networking Website*, or *Blogs*—rather than what methods they use.

Examples include:

- Google searches the entire web. Google Blogs lets you also target blogs specifically.
- Technorati and BlogPulse, both free, search blogs.
- BackType and YackTrack search for keywords in the comments sections of blogs.
- Commentful tracks comments on multiple sites, including blogs, Digg and Flickr.
- BoardTracker searches discussion boards by both thread and tags.
- Addictomatic.com lets you listen to many of the tools listed above on one, continuously-updated page.

Similarly, you can search for topics in *Facebook*, *Twitter*, YouTube and Flickr, among others, by using each site’s respective search functions.

Because constantly searching a number of sites can be time consuming, it’s often more convenient to be notified when one of your keywords is being discussed. Google Alerts, for example, will send you daily emails whenever your keywords are mentioned—though it doesn’t find all social media mentions. TweetBeep does the same thing for conversations taking place in *Twitter*.

The most robust way to handle online listening is to use an *RSS* tool to create a “listening dashboard.” Most of the sites above let you create *RSS* feeds for particular keywords—you can then pull those feeds together into a “dashboard” using an *RSS* reader. This method often results in a huge amount of duplicate content, but advanced tools like Yahoo! Pipes can help reduce the clutter.

Higher-end tools like Radian6 and Jive can create robust listening dashboards with less work, but they’re best suited for organizations with the resources to afford them and enough online mentions to make it worthwhile.

Don’t forget the more traditional ways to listen to people, like *Online Surveys*, phone calls or old fashioned feet-on-the-ground conversations with people in your community. ●



For more resources,
see www.idealware.org/listening

Petitions and Pledges

People sign their names and other contact information to online petitions, which are sent to an organization or a person, like a government agency or Congressman, to show that large groups of people support a particular cause or viewpoint. Online pledges are similar, but signers typically pledge to take a particular action—for instance, to stop drinking bottled water—and the list of pledges isn't necessarily sent to anyone.

Nonprofits often use both as list-building tools to gather contact information from those interested in their causes.

Technical components of pledges and petitions are the same—you need a web page with information, a way for “signers” to submit their contact information, and a way for your organization to see the contact information of those who signed the petition or pledge. It's also useful to be able to customize the look and feel of the page, or add your logo.

Since the basic functionality is a simple online form, you may already have software that can help. For instance, most *Web Content Management Systems* let you create web forms. Some *Integrated Online, Donor Management* and *Constituent Relationship Management* systems provide similar functionality, and flow information about those who sign directly into your constituent database. Simple online form builders, like Google Forms, Woofoo or Formstack, could also be used for basic Petitions or Pledges.

Quite a few sites provide specific functionality to support nonprofit petitions or pledges, including Care2's The Petition Site, Petitiononline.com, Cause.org, PledgeBank and *Facebook* Causes. These sites allow you to promote your cause to their existing audience, and sometimes provide more sophisticated functionality, like the easy ability to show the names or total number of people who have signed. Make sure it's easy to export contact information for those who've signed—some tools make it difficult, or charge additional fees. ●

 For more resources,
see www.idealware.org/petitions

Photo Sharing Websites

Photo-sharing websites let you post photos in a central location where staff, constituents or anyone else can see them. You can upload your photos to these free sites, organize them and perform minor editing—for instance, cropping, correcting colors or removing red-eye. (For more serious manipulation, use *Photo Editing* software.) Flickr is the most popular site, but others, like Picasa, SmugMug and Photobucket, are also widely used. *Facebook* can also be used to post photos.

These sites let anyone easily post their photos. They're not only good for letting your constituents see pictures, but also for letting them post their own pictures of your events or organization. It's easy to tag pictures in order to easily collect them in a group.

These sites can be useful to share photos across an organization, as well. Because they're online, remote staff can easily access them, and they're backed up in case of a fire or hard drive crash. However, these tools don't offer particularly robust functionality to organize or search if you have hundreds or thousands of photos—*Digital Asset Management* software could be helpful for these more sophisticated needs. ●


 For more resources,
see www.idealware.org/photosharing

Photo Sharing Meets Social Networking

All the sites listed here also offer social networking features to broaden the number of people who will see your photos. For example, Flickr lets you invite people to join your group to easily see your most recent pictures—they can comment, add keywords or tag people in photos, making it more likely that people interested in your subject will find them.

Podcasts

Podcasts are syndicated audio or video shows that allow people to subscribe. When a new show is available, files are automatically downloaded onto subscribers' computers. In fact, that's the main difference between podcasts and other types of audio or video files—podcasts are subscription-based and downloaded via [RSS](#) so subscribers don't have to seek them out.

Nonprofits can use them in a number of ways to create awareness or educate people about their causes. Podcasts can be useful to record and broadcast meetings, conference calls, speeches and more. Keep in mind, though, that creating polished multimedia content is time-consuming. If you have the audio or visual content or the experience to create podcasts, they can provide an interesting way to distribute information, but think carefully about the time involved before committing yourself to creating new multimedia content on a regular basis.

The first step is to record audio or video using a microphone or camera, and edit it using [Multimedia Editing Software](#). Once you've polished the content and exported it into a standard file format, decide whether to post the podcast on your own site or on a site designed to store them, like Hipcast.com, LibSyn, Podbus, OurMedia or others. These sites range from free to around \$5 per month.

Once your podcast is hosted and published, people can subscribe via most [RSS](#) readers. You should also submit your podcast to a site like iTunes or Odio that allows people to easily find it. On these sites, users search for podcasts or enter their web addresses, and the site downloads the files directly onto their computers or iPods as soon as they are available. ●



For more resources,
see www.idealware.org/podcasts

RSS

RSS, or Really Simple Syndication, is an easy way to stay on top of information you're interested in reading. Instead of visiting a number of blogs and websites every day, you subscribe to sites via RSS and their updates are sent to you.

If a blog or website supports RSS, it typically displays an orange RSS icon somewhere on the page or in the navigation bar. You can then subscribe to the RSS feed by simply clicking on that icon.

To view the feeds you subscribe to, you'll need some kind of software package that's designed to pull in and display feeds. Many internet or email browsers—like Internet Explorer, Firefox, or Microsoft Outlook—include functionality that allow you to easily see feeds in one place. Most “start page” sites, like iGoogle, also let you pull in RSS feeds.

If you want to follow a lot of different feeds, more specialized tools can help. These tools, called “feed readers,” “news readers,” “blog readers” or “RSS aggregators,” let you see and manage all the RSS feeds you've subscribed to. Feed readers can be web-based, like Google Reader and FeedReader, or desktop-based, like NewsGator's FeedDemon for PCs and Vienna for Macs. Most are free and make it easy to see and organize updates for all the sites you've subscribed to. Other tools, like FeedBlitz, let you subscribe to RSS through email (instead of a feed reader).

You can also use readers in conjunction with *Online Listening* to monitor what people are saying about your organization. ●



For more resources,
see www.idealware.org/rss

Use RSS to Spread Information

Keep RSS in mind as you build your own website and blog. Some people follow online information solely by RSS, so make sure you offer the ability to subscribe. Most Blog tools and Web Content Management Systems support RSS feeds. Alternatively, tools like WebRSS and RapidFeeds can help you create RSS feeds from any type of content with a little effort. Google FeedBurner can provide information about how many people are subscribed and viewing your content via RSS.

Search Engine Optimization

Search Engine Optimization (SEO) isn't a type of software—it's a set of techniques to help search engines like Google or Yahoo! Search find your website and show it high up on the list of results people see when they search for terms you specify.

Two steps in particular make a big difference. First, encourage as many sites as possible to link to you. These links help search engines find your site, and the more incoming links from credible organizations, the higher you're listed in search results. Second, identify keywords for which you'd like to be found, and use them prominently—for instance, to be found by those searching for “food pantries in Cincinnati,” use the words “food,” “pantry” and “Cincinnati” often in page text, prominent headers, titles and even page file names.

A good *Web Content Management System* can help place your keywords effectively, as well as with the more technical aspects of SEO. *Website Analytics* tools can then help you track the keywords used to find your site.

It's often useful to go beyond SEO, as well, and consider paid placement. For example, some search engines let you buy ads for particular search terms (this technique, called Search Engine Marketing (SEM), is covered in the *Online Advertising* section). In particular, Google offers a Google Grants program that provides free Google Ads to qualifying nonprofits. ●



For more resources,
see www.idealware.org/seo


Social Content Websites

More and more nonprofits are taking advantage of the popularity of websites where readers help create the content. These sites can provide interesting opportunities to promote your cause by distributing your articles or resources to a broad online audience.

For example, you could help people find your articles or resources by adding them, with keywords, onto “social bookmarking” sites where people share links, like Delicious.com. Or you can promote your content on “social news” sites like Digg and Reddit—you add articles or links that readers can vote on, and popularity determines how prominently the link is shown.

Alternatively, you could promote your whole organization through nonprofit specific “charity portals” such as Jumo, GreatNonprofits.org or Change.org. These sites allow you to post information or a profile about your organization to try to reach those interested in your cause.

You might also help shape the conversation about your organization and issues on Wikipedia, a publicly maintained encyclopedia, where readers add or edit almost any entry on the vast site. It’s important to avoid appearing biased or self-promotional—entries are watched closely, and other editors will remove what they find useful. ●

 For more resources, see www.idealware.org/socialcontent

Are They Already Talking About Your Issue?

It’s likely there are at least a few existing communities—forums, blogs, email discussion lists, social networks or shared calendars—where people are already talking about the issues you care about. Participating is an easy, effective way to understand what your constituents care about, promote your organization and reach new supporters. But how do you find these communities? You can search the Web with Online Listening tools to find conversations about your issue. Or, ask your volunteers, board members or constituents to scan places they go online.

Supporting Online Actions

Organizations use a number of online tactics to get constituents involved, like asking them to send emails to decision makers or politicians, or to take other actions on their behalf. Tools for supporting online actions make it easier to encourage and manage such techniques.

For example, the software package CitizenSpeak lets you easily create email campaigns for a recipient with a straightforward email address, like a corporate CEO. However, reaching Congressional representatives is more difficult—many route online communications through web forms to help block automated emails. You could ask constituents to find and email reps for free through Congress.org, but more expensive tools like CapWiz and a number of *Integrated Online Systems* (like DemocracyInAction’s Salsa, Blackbaud Sphere and Convio) help supporters draft and send emails that reach the appropriate audience.

Alternatively, you could ask supporters to write letters to the editor of their local papers. Functionally similar to email campaigns, you’ll also want to provide contact information for media outlets—again, some more-advanced *Integrated Online Systems* provide lists of lists of addresses of media outlets. Green Media Toolshed offers specialized functionality in this area for environmental organizations.

Or, ask supporters to call particular targets, and provide phone numbers and talking points to help coach them on your website. Advomatic’s Click-to-Call tool automates this process—supporters enter their phone numbers, and the system calls both them and the target number and links the call, letting your organization cover any long-distance charges.

Other online actions include asking supporters to sign a *Petition or Pledge*, or forward messages or eCards to friends, both of which are typically supported by *Integrated Online Systems* and *Web Content Management Systems*. Or ask them to post a “badge” (just an image) or “widget” to their own *Blog* or website. ●

 For more resources,
see www.idealware.org/actions

Twitter

Twitter is a popular social networking system that lets you create a minimal profile for your organization, and send out a stream of short messages called “tweets”—updates about what you’re doing, conversation starters, requests for help, or links to resources of interest. Tweets are limited to 140 characters or less, the maximum length of a text message on many phones. In fact, many people send and receive tweets on their cell phones.

You can use the Twitter.com website to manage your account, but many people instead choose to tweet via applications like TweetDeck, Seesmic or HootSuite that allow much more sophisticated management of incoming and outgoing tweets—both on smartphones and computer desktops.

People can choose to “follow” your Twitter account, which is like subscribing to your feed, and if they particularly like one of your tweets they can “retweet” it—post it again so their own followers see it. It’s in retweeting that much of the power of Twitter lies. If you post something interesting that’s retweeted exponentially, you can reach a huge amount of people very quickly.

You can also use “hashtags” (the # symbol, sometimes known as the “hash,” followed by a one-word keyword) to post a tweet to a certain group. For instance, including the #nptech tag will flag your post as relating to nonprofit technology and make it more likely to be seen by those following #nptech tweets. The # symbol makes your keyword or phrase easily searchable by others—various sites even track existing hashtags you can search before creating your own.

Many individuals and organizations also use URL shorteners like bit.ly or TinyURL to convert long web addresses into more space-friendly short ones.

With all social media, results will vary widely among different organizations. Twitter users tend to be more tech-savvy. You should consider your audience and your mission, as well as how much time you’ll be able to invest, before assuming that Twitter makes sense for you. ●

 For more resources,
see www.idealware.org/twitter


Video Sharing and Streaming

Videos can provide a compelling way to tell your story online. While professional looking video can be expensive to produce, in both staff time and actual money, video-sharing websites let you upload videos to the web for free. Once they're online, viewers can comment and share them with friends. In general, you maintain ownership of the videos you post, but you grant the site certain rights. Before you post a video, read the site's Policies and Terms carefully.

There are many free video-sharing options, including YouTube, BlipTV and Vimeo. DoGooder TV is geared specifically at nonprofits. Brightcove lets you show videos and video pages without any logo or branding for Brightcove itself, but starts at \$99 per month. YouTube offers nonprofit-specific functionality, like the ability create a branded YouTube channel, link calls-to-action directly in videos, or accept donations directly through the video page.

It's also straightforward to broadcast video to the web live. Services like UStream.tv and Qik Services allow you to record videos via a photo or digital video camera and transmit them live on the web.

Many of these video sharing websites also allow you to post the videos on your own Web page or blog. They provide HTML (the coding language of websites) for you to copy and paste to embed the video. In most cases, the sites' logos are displayed on these videos. ●

 For more resources,
see www.idealware.org/videosharing

Want to “Go Viral?”

If enough people share a video, it can spread around the Web exponentially, eventually reaching an enormous audience. This rare, sought-after phenomenon is known as “going viral.” There's no recipe for creating viral videos, but you can start by making sure it's relevant and irresistible enough to compel people to share. And then cross your fingers.

Web Content Management Systems

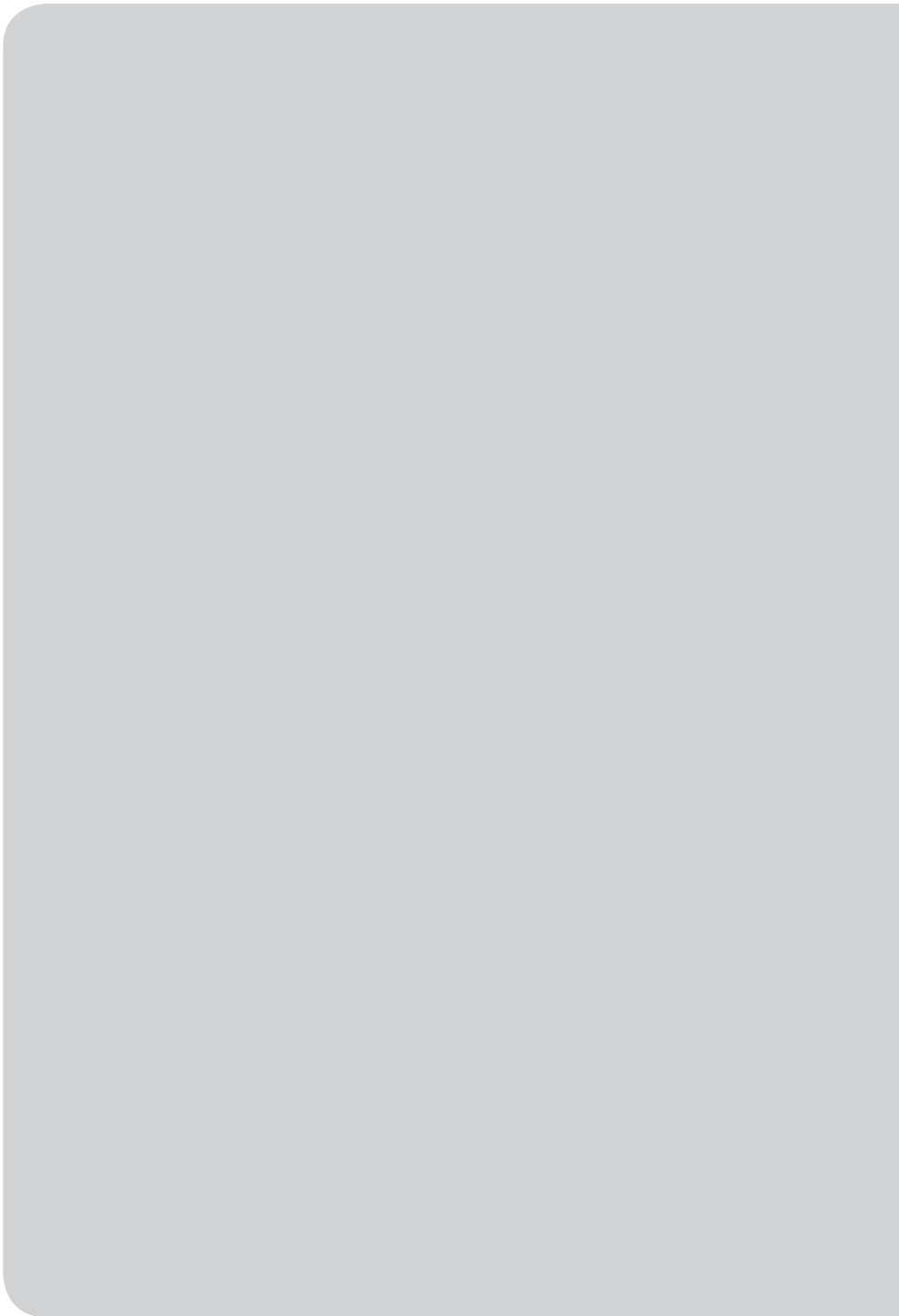
Web Content Management Systems (CMS) let you create and maintain customized websites, update their graphic design and navigation over time, take advantage of contributed modules and automate routine updates—for instance, removing events from your homepage after they’ve come and gone. Most won’t let you update existing sites built in other systems, however; if you want to implement a CMS for an existing site, you will have to rebuild, and sometimes redesign, the site. Their real benefit is the ability to update site content and navigation without technical know-how or web design experience. Many organizations hire consultants to build the initial site in a CMS, and then use the system to maintain it.

Widely used open source options include WordPress, Joomla, Drupal and Plone. These systems are free to download, but you’ll need someone with technical skills to set them up. Other systems, like Hot Banana, Ektron, CommonSpot, Sitecore and CrownPeak, provide sophisticated CMS functionality starting at about \$10,000 for the first year. For more straightforward sites, consider simple tools like Homestead, Weebly, Moonfruit or Squarespace that let you define navigation, pick a graphic design template, and enter text and images on simple Web-based forms. Some *Integrated Online Systems* also provide CMS functionality in addition to such features as constituent management and broadcast email functionality. ●

 For more resources,
see www.idealware.org/webcms

What About Updating Existing Sites?

Other desktop tools, like Adobe Contribute, Adobe DreamWeaver or Microsoft Expression Web (replacing FrontPage), also let less-technical people update websites, but they work by directly changing the code for individual pages. These are the only tools that will help update existing sites, but they limit your ability to make updates that are more substantial or affect multiple pages. CMS systems are the better approach if you’re building a site from scratch.



Want more information? First we present some follow up websites where you can get more helpful resources. Then we tell you about the authors and reviewers who made this *Field Guide* possible. Finally, we close with a handy matrix of all the types of software we've covered to help you find in a glance what you're looking for.

Monthly Newsletters

Are you looking for great resources to build, strengthen, and grow your organization and enhance your sustainability? If so, subscribe to receive 3 free single topic, single focus newsletters each month. Each edition contains insights on organizational or program sustainability, practical tools and resources for download, and access to free capacity-building webinars. Subscribe today at www.xfactorllc.com.

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What are you doing to make sure your organization not only survives its current challenges, but thrives and becomes stronger and more resilient? X Factor can help you assess your current strengths and opportunities, evaluate the effectiveness of your current business model, and provide customized plans and strategies for building and enhancing your long-term sustainability. Visit www.xfactorllc.com or call 800-883-7196 to learn more.

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Are vital programs and services being threatened by funding cuts or reduced donations? X Factor can help you develop and implement strategies to address the sustainability of key programs. Visit www.xfactorllc.com or call 800-883-7196 to learn more.

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If you're looking for energetic and engaging speakers or trainers to address any aspect of organizational leadership, program or organizational sustainability, X Factor is the answer. Visit www.xfactorllc.com or call 800-883-7196 to learn more. ●

About Idealware

Idealware helps nonprofits make smart software decisions by synthesizing vast amounts of original research and information into thorough, approachable resources that make even the smallest organizations feel confident in taking the next step in their software selection process. We provide a trusted and authoritative online guide to nonprofit software including scrupulously researched in-depth reports, an online training library, and many articles and case studies—for free—through our website, www.idealware.org. We also partner with organizations to develop customized training and research to benefit entire networks of nonprofits.

About X Factor Consulting

X Factor partners with nonprofit organizations, foundations and grantmakers, government agencies and partners, and nonprofit networks and coalitions to unleash the potential of and maximize possibilities for nonprofit organizations so they can continue their work and fulfill their mission. X Factor offers a variety of services including comprehensive organizational sustainability planning, program sustainability planning, training workshops, webinars, and keynote speaking.

These services maximize the IMPACT partner organizations make on the clients, communities, and causes served by:

- Increasing the competence and confidence of leaders
- Building strong boards and leaders
- Improving fundraising skills and funding potential
- Identifying new funding sources
- Determining and communicating organizational and program value
- Mobilizing community and constituent involvement
- Developing and enhancing the organizational image
- Increasing effectiveness of marketing and communications
- Building and strengthening collaborative networks ●

Laura Quinn

As Idealware's Executive Director, Laura leads Idealware's activities to provide candid information to help nonprofits choose software. Through research, reports, articles and training, Idealware allows nonprofits to make smart, informed software decisions. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

Chris Bernard

Chris is Idealware's Senior Editor, and a longtime freelance writer. Prior to joining Idealware he worked as a newspaper, magazine and public radio journalist and managing editor, as senior copywriter at an advertising agency, as a corporate marketing and communications specialist, and as a technical writer. He also wrote a travel book about bicycling in New England. ●

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To learn more about X Factor Consulting, please visit us online at **www.xfactorllc.com** or contact us toll-free at 800-883-7196.

What types of software should your nonprofit be using? It's not easy even to know what types exist, let alone what might work for you. Through a friendly, easy-reference format, this book helps you pinpoint the types of software that can help your organization based on your needs and your level of technology savvy, and provides user-friendly summaries to demystify all the possible options.



helping nonprofits make
smart software decisions