

the eNonprofit:

a guide to
ASPs, internet
services, and
online software

This Guide is available for free download at
www.compasspoint.org/enonprofit

By Michael Stein and John Kenyon

CompassPoint Nonprofit Services

Made possible by support from the
Community Technology Foundation of California

Foreward

The idea for this guide came in the midst of the dot-com boom. We all remember those start-ups trying to convince us that we would be left behind if we didn't buy their services. Well, since then many of those companies have disappeared, and nonprofits continue to work to bring about change in our communities. With the dot-com hoopla dying down, we can focus on the realities of using application service providers (ASPs) rather than the hype. Four of those realities are:

- ▶ **Reality #1** ASPs are here to stay. Despite the disappearance of many of the start-ups, there will continue to be companies offering their services via the Internet. A good reality: they'll get better.
- ▶ **Reality #2** Many of us are already using ASPs. No, ASPs aren't secretly signing you up for their services (or I hope they're not), but if you're using Topica for an email newsletter (or email listserv) or posting your volunteer opportunities on volunteer-match.org, you're using an ASP. If you're reading Yahoo Mail via the Web, you're using an ASP. Many of us picture ASPs as only very complex services or traditional software services (like word processing or accounting) via the Web, but, as you will see, they can be very simple, but effective, and the services they offer range widely.
- ▶ **Reality #3** Many of us should be looking to use ASPs right now. See Part 1 in this Guide for Ten Quick and Easy ASPs You Can Use Today. This is something of an amendment to Reality #2. If you're not yet using an ASP, this Guide can help you can find several places to get started with a small investment.
- ▶ **Reality #4** We should think about ASPs as a permanent technology strategy for our organizations. Many of our organizations are chasing the "holy grail" of information systems (myself included) – a system that does everything that we want in every possible way we can conceive. That's probably a fantasy, but we continue to hammer away at homegrown systems. The promise of ASPs is that they will give us immediate access to technology that would be too hard or expensive to develop ourselves. While not fulfilling our dreams of the perfect system, we may get a lot more technology than we currently have.

As ASP services improve, high speed Internet connections become more accessible, and our organizations' technology demands increase, ASPs will become more and more important to nonprofits. In turn, nonprofits will become a more important market for ASPs. We should look to using our market power to insist on multi-language support, Web pages that are completely accessible to people with disabilities, and free services to small organizations, all-volunteer organizations (AVOs), and organizations serving low-income communities and communities of color.

Lastly, I would like to thank the Community Technology Foundation of California for their leadership and support to Michael Stein, John Kenyon, and CompassPoint in developing this Guide for the nonprofit community. CompassPoint's mission is to increase the effectiveness and impact of individuals working and volunteering in the nonprofit sector. There couldn't be a better way to do this than by providing technology, the skills to use it, and a Guide to buying the ASP services best suited for your organization.



Nelson L. Layag
Director of Technology
CompassPoint Nonprofit Services

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Acknowledgements

Many people helped us bring this Guide to life.

Eugene Chan and his colleagues at the Community Technology Foundation of California provided the critical funding we needed, and also inspired us to make the Guide as useful as possible to the breadth and diversity of California's nonprofit landscape. We are deeply grateful to the many staff of nonprofit organizations across California and the nation, including many grantees of CTF of CA who took time from their important work to speak with us and to share their experiences of working with Internet services and ASPs. Their input ensured that this Guide stayed grounded.

Nelson Layag, Cristina Chan, and Jan Masaoka at CompassPoint Nonprofit Services took on this publishing challenge with us and have worked side-by-side with us on the content, framework, and perspectives. Our editor Jan deserves special mention for her wisdom and guidance with the Guide. We also want to acknowledge Patrick Santana and Paulette Traverso, the extraordinary design team that works with CompassPoint, whose work on the Guide has brought warmth into our typed words.

Four wonderful reviewers scrutinized the manuscript and offered valuable insights:

Antonio Diaz, *People Organized to Defend Environmental Rights (PODER)*

Marc Osten, *Summit Collaborative*

Laura Takeuchi, *Japanese American Services of the East Bay*

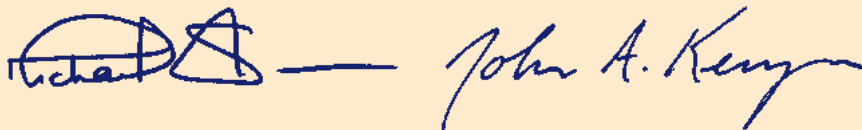
Joseph Valentine, *Morris Stulsaft Foundation*.

Staff at several ASPs provided customer referrals to help us track down nonprofit agencies that had worked successfully with their services. Many other individuals helped us along the way with advice: Nick Allen, Edward Batista, Matt Florence, Sharon Johnson, Amy Luckey, Mano Marks, Maureen Mason, Marshall Mayer, Eve Smith, Jonathan Stein, Scott Walton, Colette Washington.

At nonprofits, the real world of nonprofit technology is complex and challenging, and it competes with other important priorities and budgetary commitments. There is an immense variety of nonprofit experience with technology, and it has been inspiring to see how many nonprofits have actually worked with ASPs, and learned about themselves and their organizations in the process. Even with the challenges nonprofits face, nonprofit staff and volunteers are out there exploring new ways of working to improve how they operate and serve their communities.

And finally, our thanks to our respective partners, Estee and Malik, whose support and understanding we continue to enjoy and appreciate.

Thank you all.

The image shows two handwritten signatures in dark ink. On the left is a stylized signature that appears to be 'Michael Stein'. On the right is a more fluid signature that reads 'John A. Kenyon'. A horizontal line separates the two signatures.

Michael Stein and John Kenyon
Berkeley and San Francisco, California
January 2002

How to use this Guide

This Guide is designed to help nonprofit agency staff work with Internet services, application service providers (ASPs), and online software. To simplify things, we refer to this collection of services as ASPs. Board members, executives, administrative staff, managers, and technicians will find this Guide useful in different ways. You do not have to be technically experienced to read or use this Guide, and if there are terms you are not sure about, be sure to check our Glossary.

A GUIDE TO THE GUIDE

- Part 1** is a *Beginner's Guide*: a simplified process to get you started easily, a list of ten quick and easy ASPs you can use today, and some reflections on Internet use in the nonprofit sector;
- Part 2** discusses the *Pros and Risks* of various ASPs;
- Part 3** is a *Directory* to nonprofit-relevant ASPs with tips for evaluating them;
- Part 4** is a detailed guide to help you in *Selecting an ASP*;
- Part 5** helps you think through *Implementation* issues when working with an ASP;

Lastly, there's a section on *Further Resources* on nonprofit technology, and a *Glossary* of terms.

Throughout the Guide we give you short **Real Stories** from actual nonprofits that have worked with ASPs to demonstrate how the issues we raise work in the real world.

Caution: Internet technology and the Internet industry are constantly evolving. We discuss specific ASPs by name in the body of the Guide, in the case studies, and in the directory. We accept that the final printed and downloadable PDF version of this Guide will contain listing errors as services close down, merge, or change their product offerings. To assist nonprofits in keeping up with the changing information on ASPs, **we recommend the following three online resources** that offer either up-to-date listings or searchable online resources:

- ▶ www.TechSoup.org
- ▶ www.NonprofitMatrix.com
- ▶ www.Actknowledgeworks.net/ephil

All the content in this Guide is available **FREE** online, as Web pages, as downloadable and printable PDFs, or in a database format. You'll find the Guide at:

- ▶ www.compasspoint.org/enonprofit



1 A Beginner's Guide to ASPs

INSIDE THIS SECTION

- Getting started quickly with ASPs
- Ten ASPs that you can get started with quickly and easily
- Five steps to selecting an ASP
- Some comments on Internet use in the nonprofit sector
- Some nonprofit agency examples

Getting Started Quickly with ASPs

Long before the commercial sector discovered Web sites for marketing and advertising, nonprofits were building the first organizational brochure Web sites, setting up discussion listservs, and using email to network, educate, and mobilize. A decade later, nonprofits are still pioneers in finding new ways to harness the Internet to accomplish their goals.

An important trend for today's nonprofits is the Application Service Provider or "ASP." An ASP is a technology company that develops and delivers software tools over the Internet, usually for a monthly fee. There are over 300 ASPs in operation today that serve nonprofits. Most are for-profit companies, but a small number are not-for-profit.

WHAT IS AN ASP?

An ASP is a technology company that develops and delivers software tools over the Internet, usually for a fee. ASPs that focus on the nonprofit sector offer services to meet nonprofit needs, such as online fundraising, Web site management, listservs, and volunteer recruitment

HOW DO YOU PRONOUNCE "ASP"?

The word "ASP" is pronounced one letter at a time (like "IBM").

Nonprofits use ASPs to conduct the following types of services online:

- accounting
- activism and advocacy (email and fax systems, legislative advocacy)
- alumni portals
- auctions
- content management and Web site maintenance
- credit card transactions online
- data and database management
- distance learning
- donor and membership management
- email messaging and listservs
- event management
- fundraising online
- group collaboration (virtual offices)
- planned giving
- stock donations
- surveys
- search engines
- traffic access logs
- volunteer recruitment
- web discussion forums

In addition, some ASPs offer multiple services as part of integrated suites.

Nonprofits Use ASPs

Nonprofits of all sizes, budgets, and missions representing diverse communities across California and the nation are working with ASPs today to meet some aspect of their technology and programmatic needs:

Diversity Works in Oakland uses 4Charity.com to help them with their online credit card donation system. They've taken in over \$9,000 with this tool plugged into their Web site.

The Young Nonprofit Professionals Network in San Francisco uses Topica.com to run two email lists, one for discussion and another for job listings.

The Korean Community Center of the East Bay in Oakland uses NetworkForGood.org (formerly Helping.org) to help with online credit card donations.

The staff at **Youth Alive** in Oakland use the free ASPs Topica.com and YahooGroups to participate in online discussion forums on violence prevention issues.

Black Women for Wellness in Los Angeles is looking into using PayPal.com to help visitors become members or purchase their aromatherapy products.

The Alley Theatre in Houston uses Convio.com to manage the content on their Web site, accept credit cards, and sell tickets online.

The **Silicon Valley Toxics Coalition** in San José uses eGrants.org to accept credit card contributions through its Web site.

The **Aidan Montessori School** in Washington, D.C., uses the online auction BenefitEvents.com to help them fundraise.

Being Alive in San Diego uses the donor management eTapestry.com to track donations for its HIV and AIDS support services.

The **Appalachian Mountain Club** in Boston is using the email messaging and advocacy ASP GetActive Software to activate its members on important policy issues.

People Organized to Defend Environmental Rights (PODER) in San Francisco uses Topica.com to allow easy email networking between a small group of community activists.

ASPs serve nonprofit needs

GetActive.com

*email messaging and donor mobilization
for online advocacy campaigns*

eGrants.org

secure online credit card transactions

BenefitEvents.com

online auctions

SmarterOrg.com

online learning environments

eTapestry.com

donor database management

Convio.com

*web site hosting, email messaging, event
management, surveys, online fundraising*

SeeUthere.com

online event management

AssetStream.com

processes gifts of stock to nonprofits

CommunityApps.com

private collaboration spaces and calendars

NONPROFIT SOUND BITE

"We use eGrants.org to accept online credit card donations through our Web site. It was in some ways a political decision to use eGrants, because it is a dot-org and part of the Tides Foundation. Given the upheaval in the Dot Com world, we also figured that eGrants.org would be more stable. eGrants also offered more advice, classes, and workshops on making the online donations work for us."

— Leslie Byster,
Silicon Valley Toxics
Coalition,
San José, CA.
www.svtc.org

Ten Quick and Easy ASPs You Can Use Today

MANY ASPs ARE FREE AND SO EASY TO USE THAT YOU SHOULD SIMPLY TRY THEM OUT.
HERE ARE SOME GOOD OPTIONS:

topica.com

Topica is a great free service you can use to distribute an email newsletter or set up an email discussion list – sometimes called a listserv. This service is extremely easy to set up whether you're starting from scratch or already have 300 email addresses. You can add a handy "email subscription box" to your Web site to allow visitors to subscribe easily. An archive of all your messages is stored automatically on the Topica Web site, but that archive is not full-text searchable, nor does it store any attachments that were originally sent. Two downsides to this service are that system emails will come from XXX.topica.com, and some minor Topica branding will appear at the bottom of every message that gets sent out.



http://groups.yahoo.com

YahooGroups is another great, basic, free service (similar to Topica.com) that you can use to distribute email newsletters and set up email discussion lists. All the features work the same as Topica.com (see above), except that the archive of messages (that is stored automatically on the YahooGroups Web site) is full-text searchable, and it can store any attachments that were originally sent.



networkforgood.org

Network For Good (formerly Helping.org) is run by the AOL Time Warner Foundation, and allows you to accept credit card gifts through the Web. You install a "Donate Now" button on the site that links directly to a personalized giving page you create at Network For Good. They charge no fees to use this service, clearly one of the best deals on the Web for nonprofits. One downside is that your giving page on Network For Good cannot be personalized with your logo or other navigational items. To get started, visit the Network For Good Web site, scroll down to the bottom of the home page and click on "Nonprofits Click Here."



zoomerang.com

Zoomerang exclusively provides online surveys that you can plug into your Web site or announce in your e-newsletter. They offer a free survey service for a limited 30-day use, which is usually enough time to run a survey. It's fairly easy to build your own survey using their on-screen instructions and options, and you get real-time results which can also be downloaded into spreadsheet programs as needed. You can upgrade to more features with a service that costs around \$200 per year. To get started, just visit the Zoomerang Web site, register for free to become a member, and proceed to set up a survey.



volunteermatch.org

VolunteerMatch helps you recruit, manage, and communicate with volunteers online. This nonprofit project won two Webby Awards in 2001, and runs a huge Web portal, which attracts hundreds of thousands of visitors annually, thus assuring a steady traffic of potential volunteers. To get started, visit the VolunteerMatch Web site, click on "About" and then on "FAQs" and then on "Nonprofit FAQs" to read all about how to set up their service. Try listing one volunteer opening first to get experience in how it works.



GUIDE TIP

Visit the ASP Directory in Part 3 to find a more complete list of services to choose from.

ezboard.com

EZBoard is an easy and affordable way to set up a Web discussion forum that can be plugged into your Web site. Many Webmasters opt to install complex scripts to set up Web forums, but this ASP makes it easy with multiple display formats, colors, layouts, features, and more. They offer a free service that displays advertising, and pricing starts at as little as \$5 per month for more features. To get started, visit the EZBoard Web site, see how other organizations have set up their forums, and then register to try it out.



atomz.com

Atomz is an easy and free way to put a search engine on your Web site to help visitors find specific items on it. To get started, visit the Atomz Web site and signup for the service (click "Join Now"). Then you have to have your Webmaster or Webmistress install a few lines of Java software code on your Web site so that your Web site becomes enabled. Once a week, you get a report on all the searches that were done on your Web site.



egrants.org

eGrants offers a service that allows nonprofits to accept credit card contributions through their Web site. This ASP is a nonprofit affiliated with the Tides Center in San Francisco. To plug this service into your Web site, you install a "Donate Now" button that links directly into eGrants. They don't offer any free services, but they excel at helping nonprofits understand the technology and offer a number of training resources and publications. To get started, visit the eGrants Web site and click the green "Donate Now" button to learn about their service.



webtrends.live.com

WebTrends Live offers a free service that allows you to track all the statistics of visits to your Web site. Their "Personal Solution" service allows you to track an unlimited number of Web pages. To get started, visit the WebTrends Live Web site and register. Then you have to have your Webmaster or Webmistress install a few lines of Java software code on your site so that your Web site becomes enabled. The traffic reports are available on the WebTrends Live Web site and show number of visits to pages, most popular pages, referrer logs, browsers used, and more. More full featured versions of this service are available for monthly fees.



thepetitionsite.com

The Petition Site offers a free service to set up a petition on the Web. They've set up the technology to make the process of gathering signatures easy. This Web site is operated by environmental portal Care2.com, which is a non-partisan tool for people working on a variety of issues and causes. To get started, visit The Petition Site and click on "Create Petition" to build your petition on their Web site, and then give out the Web address through emails and Web links to drive traffic. It's ingenious because it's so simple to use. People who sign the petition are given the option to subscribe to your organization's e-newsletter.



cast.org/bobby

An ASP that's not just for nonprofits is the "Bobby" site that evaluates Web sites "on the spot" for how accessible they are to people with disabilities. Go to the Bobby site and type in your Web address and it will show you the areas at your site that need improvement. If your site is "Bobby approved," you can apply to have a little Bobby icon for your home page.



Five Steps to Selecting an ASP

ASPs come in all shapes and sizes. Some are quick and easy, while others take longer to select and implement. In this section, we provide the basic process on getting started with ASPs, and we look at ten ASPs you can implement this week. This way you can get your feet wet working with ASPs with a small investment of time and money. Many of the services mentioned in this section offer some free services, which – needless to say – are popular among smaller nonprofit organizations that have tight budgets.

The process of selecting an ASP varies with agency size, needs, and resources. Here is a description of the five steps that we've identified while interviewing nonprofit staff that have worked with ASPs in the past year.

1 STEP ONE

- ▶ Designate someone in your nonprofit agency who will spearhead the effort to work with an ASP (for example, the Membership Director or Fundraiser).
- ▶ Identify who will input and maintain data. Decide who will define the outputs of the system – the end product you want. Include both technical and non-technical staff on your team, and the staff who will actually use the ASP tool.

2 STEP TWO

- ▶ Define your needs as simply as possible. An example of a general needs statement might be: "We need to install an online donation tool that allows people to donate money with their credit cards," or "we need a listserv to communicate with our network of advisers across the country."
- ▶ Then add other requirements you might have (for example, inexpensive or easy to use) that relate to your operations.

3 STEP THREE

- ▶ Search for ASPs that match your needs, by reviewing the Directory in our Guide. Other resources are nonprofitmatrix.com, techsoup.org and actknowledgeworks.net/ephil.
- ▶ To get a good idea of how a service is used and how it really works, speak with other nonprofit customers of the service. To find those other customers, ask ASPs themselves, ask on listservs, and talk to other nonprofits and board members you know. Try to find organizations that use the service in the same way you plan to use it.
- ▶ Ask these three key questions to other organizations: How do you use this ASP? What was your setup experience? Is their Technical Support helpful? This is a great way to learn about real world experiences with an ASP, but can't take the place of listing your needs and expectations as benchmarks for selection.

4 STEP FOUR

- ▶ Selection criteria should include your needs for features and functionality of each ASP, pricing plans, frequency that the ASP updates the software, its commitment to customer service, testimonials from existing customers of that ASP, and the business stability of the ASP. (See Part 5 of the Guide for a more detailed description of this process.)

5 STEP FIVE

- ▶ Sign a contract and then implement the technology that the ASP will be providing.

SELECTING AN ASP

- assemble a team
- define your organizational needs
- search for ASPs and get bids
- apply your search criteria
- check customer references
- sign a contract

Take Your Time

Researching and selecting an ASP can be a daunting task. Do your homework and take your time to make a decision that you're confident about. Not all ASP selections happen in the same manner. Adding a search button to your Web site (such as Atomz.com) may take only a review of a few ASPs and a few discussions with your Web person to review your needs before moving forward with implementation. You can be up and running in a few days. On the other hand, working with an ASP to change your entire donor database management system could take several months of planning and implementation. It could involve putting together a team of staff and consultants, having several planning meetings to assess your needs, researching your options, getting quotes from several ASPs, meeting with finalists, making a selection, and then moving forward with implementation.

Internet Use in the Nonprofit Sector

ASPs have brought a technology revolution of sorts to the nonprofit sector. By offering sophisticated new Internet services to help nonprofits, ASPs have challenged the nonprofit sector to understand what they have to offer – a process that isn't always an easy one for either nonprofits or ASPs. Nonprofits use the term “accidental technologist” to refer to nonprofit staff who have had to become experts in technology without formal training. Many nonprofit organizations – particularly those with limited financial and staff resources – were already challenged by the first wave of the Internet's development, when many nonprofits built their first Web sites and sent out their first email newsletters. ASPs that serve nonprofits today are offering themselves as the second wave of Internet development, allowing nonprofits to do things they only dreamed possible before.

In spite of the many ways that ASPs can and do help nonprofits today, there is also a challenging side to this new technology landscape. Nonprofit staff need to learn about and understand the technology that ASPs are selling them. There are complex technology issues to consider, new language and jargon to learn, and needs assessments to undertake. Many nonprofit staff that are new to ASP technology solutions are asking themselves if ASPs are worth considering or if they're a waste of time and money. When is a nonprofit ready to use an ASP? How does a nonprofit evaluate the different services and select the one that is right for them? How does a nonprofit know which ASPs to trust to be in business a year from now?

Depending on what a nonprofit agency hopes to do with an ASP, the investment – both financial and in staff time – should be clearly understood. Explore the Total Cost of Ownership (TCO) of working with an ASP, which should include staff and management time to do the planning, selection and implementation; costs to work with an ASP; costs to improve the technology infrastructure in your agency; and any other costs that will be required to make this process successful

Dot-Coms in a Dot-Org World

For some nonprofits, the process of selecting and working with ASPs is frustrating and difficult, while for others it is smooth. In many cases, nonprofits and ASPs had to come together to find common ground, bridging cultural gaps that separate nonprofit and for-profit institutions. Nonprofit staff often describe ASP sales people that are ill-prepared to deal with the real world of the nonprofit sector. The classic, transparent ASP sales pitch, complete with vendor booths at conferences, PowerPoint presentations, full-color handouts, and follow-up phone calls make some nonprofit staff feel like sales targets on a quarterly target list. Many nonprofits are glad to share their advice with ASPs on best practices when approaching nonprofit agencies.

ASPs themselves are learning how best to approach and work with customers in the nonprofit sector. Nonprofits report that ASPs are listening more to their nonprofit customers, adapting their products to fit precise needs, hiring former nonprofit staff to better reach out and understand nonprofits, and creating nonprofit advisory boards to institutionalize nonprofit perspectives in their business development and community activities.

Managing Risk

Nonprofit concerns about the reliability, security, and longevity of ASPs are legitimate. Many nonprofits have been impacted directly when an ASP has gone broke and closed down. The ASP industry is still developing, and nonprofits should anticipate more changes over the next several years. As your nonprofit selects an ASP, be aware that this process of forming and changing in the industry is ongoing. Try to assess the business health of an ASP that you are planning to use, and have a contingency plan that includes the regular backup of your data in a secure, independent location.

Looking Forward

ASPs hold tremendous promise and offer unique tools to help nonprofits succeed in a world that demands quick access to information, self-service, privacy, and convenience. In spite of the youth and volatility of the nonprofit ASP sector, many nonprofits have used ASPs successfully to raise money, build donor relationships, advocate on behalf of social causes, deliver services, and improve operations. ASPs, like other technology tools, can be used by nonprofits to support their work shaping change in our communities.

Real Stories

Simon Lee, Korean Community Center of the East Bay, Oakland. www.kcceb.org.
They use NetworkForGood.org (formerly Helping.org) to handle online credit card donations:

"The Korean Community Center of the East Bay has a well developed Web site that offers a variety of content resources about our programs and activities. To allow people to contribute financially to our agency with a credit card, we use Helping.org. We've talked about it in-house among our staff, and we're comfortable linking to a nonprofit ASP, they're like a sister organization. We feel that if we link to a commercial service that it will change the quality of our organization, that it would irrevocably change our community-based mission. We actually have a lot of in-house technical expertise and could have developed our own online credit card system. But we feel that people are already familiar with Helping.org and trust their brand name. Plus, Helping.org doesn't take a fee for using their service."

Alaina Fasano, Youth Alive, Oakland. www.youthalive.org.
She uses both Topica.com and YahooGroups to run email lists (listservs):

"The agency that I work for doesn't have its own e-newsletter, but I participate in many listservs in the violence prevention community in California and nationwide. Some of these listservs are moderated and others are open to anybody posting. People seem to be using either Topica or YahooGroups. I think grassroots nonprofit groups use them because they're free. While some established nonprofit organizations might be willing to spend \$5 to \$10 a month for the service, I'm afraid that other, more loosely affiliated groups (without a budget) would not utilize listservs if such a fee were required. I've advised many groups to set up a listserv because they're so invaluable to the work we're all doing."

Janette Robinson Flint, Black Women for Wellness, Los Angeles. www.bwwla.com.
They use Amazon.com and PayPal.com to sell books and other products:

"Black Women for Wellness works to enhance and improve the health and well-being of Black women. Technology is both a tool and a strategy in reaching our mission. We have a Web site so women who cannot physically come through our doors are able to participate with program activities, access information concerning the health and well being of Black women, and share their stories with us. BWW uses technology as a tool by building in funding streams with our Web site. Two methods are having an association with Amazon for purchasing books, creating an account with PayPal so visitors can become members or purchase our aromatherapy products online. BWW is also in the process of investigating other fundraising ASPs to add yet another funding stream. Our primary goal will remain focused on enhancing the health and well being of Black women, not to be on the leading (some call it bleeding) edge of technology."

Garth Moore, ASPCA, New York City. www.asPCA.org.

They use Convio.com for Web site maintenance:

"Get your stuff together before you shop. Know exactly what you want to do on your Web site, down to the minutiae. If you can scope the entire Web site before you shop, you save money on the ASP doing your research. Also, you give the vendor an exact idea of what you want."

Holly Potter, Young Nonprofit Professionals Network, San Francisco. www.ynpn.org.

They use Topica.com to run email lists (listservs):

"Young Nonprofit Professionals Network needed two email lists: one for discussion and one for job listings. Our primary concern was to find a list that would allow us to opt out of ads. Topica allowed us to do that with a nominal fee and they had a good reputation with other nonprofits. The process of getting set up with Topica was very easy. Between research, committee discussion, and transfer, I would guess the whole process took 15 hours. YNPN is in the process of growing and we are now considering moving the lists to our own domain in order to bring new colleague networks in under the same domain name and to ensure consistency among YNPNs in other communities. A year ago, it did not seem necessary, but now that we likely will be running a dozen lists, it makes sense to consider transferring them."

Rebecca Jewell, International Volunteer Program, San Francisco. www.ivpsf.org.

They use YahooGroups to run a listserv:

"We were looking for a free service. At the time, it seemed like a good, basic system that's fairly intuitive and not complicated. We don't have time to learn a new system in order to communicate. And since our agency has a very small budget, whatever an ASP can offer us for free is very useful."

Jeff Ceaser, Diversity Works, Oakland. www.diversityworks.org.

They use 4Charity.com to handle online credit card donations:

"Diversity Works has been using 4Charity to allow our supporters to make credit card gifts to our organization. A number of services contacted us initially to set this up, but we used 4Charity because one of our board members was familiar with them. We've taken in over \$9,000 through our Web site since we set up the tool. We even used the tool for other organizational needs. We have a film loaning program, and use the tool to allow people to leave deposits to rent films, an unexpected benefit. We know that 4Charity offers other services but we haven't needed to use those, maybe one day."

Antonio Diaz, People Organized to Defend Environmental Rights (PODER), San Francisco.

They use Topica.com to run a listserv:

"Our organization has four full-time staff and is currently developing its technical capacity to use technology and the Internet. We use the Topica service to allow a small group of organizations working on a collaborative project to network privately among each other. We wanted to stay in touch with each other, wanted an easy-to-use service, something very low maintenance. It's also helpful that it's free because our budgets are limited."

2

The Pros and Risks of Using ASPs

INSIDE THIS SECTION

- Ten ways ASPs can help your nonprofit:
- 1 Save technical resources
 - 2 Meet multiple software needs
 - 3 Improve accessibility
 - 4 Keep software up to date
 - 5 Automate backups
 - 6 Manage software costs
 - 7 Use the same software on both Windows and Macintosh
 - 8 Create Internet projects faster
 - 9 Access software expertise
 - 10 Enhance data security

SPECIAL NOTE TO TECH STAFF

Technology staff and technology consultants that work for nonprofits are important resources to help you evaluate how a particular ASP might save technical resources. Make sure your expertise in this area is integrated throughout the ASP selection process.

1 Save Technical Resources

"I recommend using free services [such as Topica], until it is clear whether the volume of traffic warrants setting up more complex tools. Working with Topica has been useful to our all-volunteer organization, because it has allowed us to build the organization with minimal financial resources."

— Holly Potter, *Young Nonprofit Professionals Network, San Francisco*. www.ynpn.org.
They use the ASP *Topica.com*.

PROS: When you use ASP software, you're hiring an external company to build and operate a system (in other words, outsourcing) so that you don't have to use your own technical resources to do so. It is a challenge just to recruit and hire people with specialized technical expertise (not to mention compensating and retaining them). ASPs offer nonprofits fast implementation, ease of upkeep, automatic upgrades, and accessibility from multiple locations, among other benefits. The cost of large software packages, for instance fundraising software, is sometimes not manageable for an agency's budget. Using an ASP, where you are "renting" the software on a monthly basis, can be more manageable financially.

ASPs can often customize their products to meet a specific nonprofit need. In contrast, it could take up to a year for a nonprofit to build a custom software system to its exact specification. Besides money saved, the time saved can help accelerate organizational change and more quickly bring about an increase in productivity.

RISKS: Although ASPs can save technical resources, they also can reduce your control and involvement with the systems you depend on. Should you have a serious issue with your ASP, it could result in taking a large amount of staff and/or management time to get the issue resolved, so you end up losing the time you planned on saving.

2 Meet Multiple Software Needs at Once

"Our platform had been pieced together over different stages of technology and organizational growth. Having dealt with it for 5 years, we were fairly confident about knowing what we needed out of a new platform. The real issue was finding someone to integrate all of the functionality we wanted into one cost-effective (i.e., nonprofit budget-friendly) package."

— Evan Field, *International Campaign for Tibet*. www.savetibet.org.
They use the ASP *VirtualSprockets.com*.

PROS: When you use an ASP, you can often meet multiple software needs at once with integrated software suites. For example, many nonprofits have more than one contact database – one for volunteers, one for donors, and one for clients – and they often can't be combined or cross referenced for ease of searching or reporting. Some ASPs offer value by combining these functions in one integrated package. Using a package of services that provides one report that cross references every interaction a person has with your agency can give you a much clearer idea of your constituents – and your contributors.

One of the best software integrations that ASPs offer is the ability to combine email messaging with other tools such as credit card payment collection or event organizing. Since ASPs build online tools that collect personal information for nonprofits, it's easy to ask someone visiting your Web site to give you her email address, and then have the ASP store that email address for later use. That information can later be used for sending email updates or asking the Web site visitor to participate in an advocacy campaign. This type of integration was more difficult to accomplish, requiring complex mail merges and other time consuming technical wonders, before ASPs made it routine.

RISKS: There is always some risk with integrating systems, and doing it with an ASP is no exception. Integrating the system may necessitate changing the way you work, especially if staff are using different systems. Now they will need to learn the new software and integrate it with the way they work.

Integration also creates a "super system" that will demand management. If your system had been made up of smaller, separate pieces in the past, the task of managing those systems was likely spread out. With an integrated system you may need to re-examine how you manage it, which could put a large burden on one staff member.



GUIDE TIP

Take a look at the ASP Directory in Part 3 to find services that offer integrated systems.

SPECIAL NOTE TO EXECUTIVE DIRECTORS

Using an ASP to allow access to your organization's data from a variety of geographic locations can be a big productivity boost. Use it on the road, from home, late at night, over the weekend, from satellite offices, at your accountant's office, or at a funder's.

3 Improve Accessibility

"eTapestry is always accessible from any computer with Internet access. All you have to do is log on to the eTapestry site with your secure logon. I actually utilize this at least once a week from home and once I was home sick for two days and was able to still get some work done with my donor database available to me."

— Erich Foeckler, *Being Alive San Diego*. www.beingalive.com.
They use the ASP eTapestry.com

PROS: The traditional method for installing software is to install and configure it on a designated computer in the office. Most ASPs make this step unnecessary because the software is accessed over the Internet and is accessible from any computer on Earth with Internet access. With a username and password, authorized nonprofit staff can access the software they need over the Internet. This creates a double value for the organization – staff time saved on computer setup and a huge increase in the number of locations where people can be productive. An employee can work from home or while away on business and, for example, use your donor tracking software provided by an ASP through a basic Internet connection. They don't have to come into the office to use the software. This flexibility makes access to software and information easier for the employee and the organization. Accessibility to software and the information it contains is one of the most valuable benefits that ASPs provide.

RISKS: If your Internet connection goes down or your Internet service provider goes out of business, you risk losing that connection and, thereby, access to your data. When DSL provider Northpoint went out of business in 2001, many California organizations were left scrambling to re-establish their Internet connections, only to find there was a six week wait to get connected through a different DSL service provider. Even barring such a serious blow as that, no Internet connection is guaranteed. Lines get damaged, connections get broken, and service can get interrupted. Any of these actions could prevent you from accessing the software or data at all.

Always maintain a way to get onto the Internet if your high-speed access doesn't work: have a working modem and an Internet dial-up account ready to use. Most high-speed Internet Service Providers will include a dial-up account with your plan. If not, it is a good idea to request one. This prevents you from being unable to connect to the Internet if your connection goes down.

4 Keep Software Up to Date

“If you honestly budget the cost of maintaining an up-to-date server, redundant data backup, service contracts, customization, etc., the true expense is staggering. Software updates, patches, and enhancements are provided almost continuously at no extra cost to us.”

— Steve Coe, *Community Access*, New York. www.cairn.org.

They use the ASP FootholdTechnology.com.

NOTES ON SOFTWARE UPDATES

Whenever possible, train staff on software updates that the ASP makes so they can use new features. Encourage the ASP to inform you in advance of the specific anticipated changes.

PROS: Most software needs to be regularly maintained and updated. New features are added to software regularly that require your technical staff to spend time installing those updates as well as tackling any issues that come up during their use. The larger the organization, the greater amount of time this requires. One of the best features of ASPs is the reduction, or in some cases the virtual elimination, of physically managing software updates. ASPs update their software from a central location without having your technical staff physically involved. The timesaving to distribute software to 50 machines, for example, is considerable, and even more so for larger organizations, especially when there are multiple updates in a year. ASPs can update their software in the middle of the night and have it ready to use the next morning, even if they have thousands of users.

Instead of installing updates, technical staff can concentrate on training staff how to use the improved software and other duties.

RISKS: Automatic updates are an advantage, but not when they significantly change how the software is used. Your staff may access the software one day, only to find that menu items are in different places, or that a function they used no longer works the same way. Not being informed of the specifics of an update can cause issues with using the software.

5 Automate Your Backups

PROS: ASPs usually take care of the backups for you. Typically, the task of backing up the data that is stored in your software systems requires ongoing technical staff time and equipment resources. Many ASPs have more sophisticated and secure backup systems than most nonprofits.

RISKS: There is *always* a risk of a backup being lost or the data corrupted. If your ASP has a poor backup process, you could lose data you thought was secure. Or, if the business closes on short notice, there may be a delay in getting access to your data, which could be a serious problem. Another downside would be if you needed to restore information from a backup and your Internet connection was down. If you did not have a copy of your backup at your own site, or if a restoration is only possible over the Internet, you could be stuck until your connection was restored. Always have a backup copy of your data off-site to protect against disasters.

6 Manage Your Software Costs

“Money is the first in-house issue we had to deal with. We are a nonprofit...the second issue was to clearly define the goals we wanted to accomplish. However, given the importance of the issue we felt we needed to allocate for the expense in our budget.”

— Virginia Franco, *Life Steps Foundation*, Los Angeles. www.lifestepsfoundation.org.

They use the ASP Convio.com.

PROS: Traditionally you pay for software once (or in some cases every year as well) and you own it. Upgrades and extra features are purchased as needed (unfortunately, sometimes later than needed!). The initial cost of the software is just the beginning, of course, as it will require personnel and other resources to customize, maintain, and troubleshoot it, and could require a special computer to run correctly, which also must be set up and maintained. This is known as Total Cost of Ownership (TCO) – understanding all the costs of technology.

But when you use an ASP, you pay as you go, rather than having the costs all up front – more like a lease than a purchase. Having a fixed monthly cost for the service, instead of one lump sum, is very valuable for nonprofits. It’s easy to understand that paying \$500 a month is often more manageable for an organization than paying \$20,000 up front to purchase a robust database program.

SPECIAL NOTE ON COSTS

When using an ASP, be aware that there are startup costs, ongoing costs, and costs both inside (staff time) and outside the organization (hiring a consultant). Try to determine early the impact that these costs will have on your organization.

The way in which some ASPs price their products – by *use* instead of by number of copies – can save money. When you buy a software package, a copy is needed for every computer that will use it, no matter how much it is used on the varying computers. A model that is more representative of an organization's use of the software is the pricing model that charges by the number of people in your database or by the number of emails sent. This model more accurately reflects the how much you use the software. This can assist in tracking the return on investment and the effectiveness of your strategy.

RISKS: One downside of the rental model is the long-term cost, which may greatly exceed the cost of purchased software. Rather than having to spend most of the money at one time, it will mean a constant flow of money to the ASP, which may be more difficult than the one time purchase for some organizations. The charge-by-use model also has a potential downside of increasing your overall costs if the service gets heavy use. If you will be charged by the number of emails sent, and the service is wildly popular with your constituents, you could end up paying much more than you budgeted.

7 Work on Both Windows and Macintosh

PROS: Many nonprofits use both Windows and Macintosh computers. Ordinarily, extra solutions often need to be created to keep users and data connected across different platforms. With an ASP, any computer with Internet access and a Web browser can access the software, no matter what brand or platform of computer. The only choice you will have to make is which Web browser you plan to use (Microsoft Internet Explorer or Netscape Navigator), and most ASPs perform identically no matter what Web browser you choose.

RISKS: Not all ASPs disclose platform incompatibility accurately. A client of ours recently worked with an ASP that said their software would work on all platforms and with both major browsers, Netscape and Microsoft Internet Explorer. Only after many complaints did they admit that they could not support the Macintosh platform.

NOTE TO TECH STAFF

Some ASPs require their customers to download and install special software to optimize how their software product works or require that a specific brand of Web browser be used. Ask a prospective ASP about any software downloads, operating system, or specific browser that may be required so you'll know what to expect. Ask about access to help for this process as well.

8 Create Internet Projects Faster

"There has long been a desire to allow alumni parents and friends to give online. Entango was a means to create a secure system online immediately to accept gifts, without diverting internal staff and resources to the project."

— Brian Lacy, *University of Connecticut Foundation*. www.foundationuconn.edu.
They use the ASP Entango.com.

"Speed of setup was important, but we quickly realized we would need a dependable guiding hand beyond just templates and technical know-how."

— Eddy Shires, *Texas Dental Association, Austin*. www.tda.org.
They use the ASP Convio.com.

PROS: When you work with an ASP, you can get up and running quickly. ASPs build their software tools once and then resell them over and over using a "cookie cutter" model. As a result, ASPs can sometimes deploy a complete software solution in a matter of weeks. Whether a nonprofit is interested in building an online legislative advocacy system to send faxes to members of Congress or setting up an online auction, ASPs offer complete solutions to get nonprofits going quickly. Without an ASP to help, these kinds of development projects on the Web could take many months to complete, not counting equipment, software, and project management costs.

RISKS: Faster is not always better. A product may have hidden flaws or an inability to perform as promised due to the pressure to get it up and running quickly. Take the time to create a strategy and a plan for using an ASP.

9 Access to Software Expertise

“My advice to ASPs: Make the [ASP software] system simple and efficient because we never have much time or resources to dedicate time, personnel and money to operate the software. Provide the final product in a timely manner. Be easily available for Technical Assistance.”

— Virginia Franco, *Life Steps Foundation, Los Angeles*. www.lifestepsfoundation.org.
They use the ASP Convio.com.

PROS: When you use the services of an ASP, you can get specialized technical support to help you with training and troubleshooting. As we have said before, it is important that all organizations have an employee that will work with and manage the project and the relationship with the ASP. This person will also support the users of the software inside your organization, because even if the ASP provides support, you will need someone who can speak to the ASP about technical issues.

RISKS: Although ASPs provide specialized knowledge and experience, one downside could be difficulty in communicating with those technical experts. If the ASP staff cannot understand your needs, or if you cannot communicate your needs to them, it may be worth having a consultant involved in the project who can speak to your staff in a non-technical way, but be able to communicate with your ASP about technical needs.

In addition to technical communication issues, many ASPs do not have thorough knowledge about nonprofit operations. You will probably need to educate them about what your organization does and how it works.

WHAT ASPS TOLD US

“Some nonprofits don’t really understand the ASP environment. Everyone likes the idea of a lower-cost, faster-deployed solution, but only if their solution will be unique, if they pay only for tools they’re going to use, and if they have control of the software and data storage. In other words, they want a custom solution at ASP prices. That is contrary to the premise of an application service provider, and the cost-savings that a provider can pass along expressly BECAUSE it’s a common template, tool, etc. used by many organizations and individuals.”

—Anonymous ASP
Manager

SPECIAL NOTE TO LARGE NONPROFITS

Large size nonprofits have a lot to gain from ASPs that offer complex software. Larger organizations typically have larger technical staffs, and therefore spend more resources to maintain that staff. By reducing demands on technical staff, ASPs can help reduce the impact of the larger personnel costs that large organizations bear. On the other hand, large organizations will also require a larger team to implement an ASP solution than smaller ones.

10 Enhance Your Data Security

“Many nonprofits want to ‘control’ their data. I would maintain their data is much more at risk on a server in their office than under the watchful eye of a company that has the skill and incentive to protect it on your behalf.”

— Steve Coe, *Community Access, New York. www.cairn.org.
They use the ASP FootholdTechnology.com.*

PROS: ASPs provide secure environments for your confidential information. It’s not uncommon for smaller nonprofits with few technical staff to take minimal precautions to protect their data. Some may do backups of the data, but may not secure those backups. Others may not take backups offsite, risking losing data to disaster. Securing data is particularly important when it contains information such as credit card numbers, bank debit instructions, donation history and donor mailing addresses. Beyond backups, when data is stored on a network that does not have software to protect it from a break-in (either physical or over the Internet), there is a potential security problem. Although not all ASPs ensure high levels of security, generally data is more secure with them than in most nonprofit systems.

RISKS: There is a risk with any system that the ASP’s security will be compromised – and there is more reason for a criminal to want to compromise the ASP’s larger data system than that of a single nonprofit.

SPECIAL NOTE TO SMALL NONPROFITS

Complex and expensive software has, for the most part, been out of reach for organizations with budgets not in the millions. By having organizations pay on a monthly basis, ASPs allow them access to this more powerful software. ASPs provide the most expensive elements – the expertise and the hardware, reducing startup costs. Access to more complex software by small nonprofits is of real value, as it can greatly expand their ability to support their mission.

NONPROFIT SOUND BITE

“We were looking for a free and easy way for our volunteers to network amongst each other, and for our staff to answer questions that everyone could read. We were looking for a free listserv service and found YahooGroups. At the time, it seemed like a good, basic system that’s fairly intuitive and not complicated. We don’t have time to learn a new system in order to communicate. And since our agency has a very small budget, whatever an ASP can offer us for free is very useful.”

—Rebecca Jewell,
*International Volunteer Program,
San Francisco. www.ivpsf.org.*

3

ASP Directory

INSIDE THIS SECTION

- A directory of ASPs organized by type
- Definitions of services offered
- Selection tips to aid you in your evaluation process

The following directory is our best effort to offer an easily browsable list of services for nonprofits. Our key criterion was that listed services currently have nonprofit customers. There are more services in operation than we had space to list in the Guide, and offer this list as a starting place rather than an ending place. We contacted as many of the ASPs as possible to have them review their listings for accuracy and to place them in the right categories. We are aware that some ASPs change their services often, so we strongly recommend that you contact any services you are interested in to obtain up-to-date information. We recommend the following three online resources that offer either up-to-date listings or searchable online resources:

- www.NonprofitMatrix.com
- www.TechSoup.org
- www.Actknowledgeworks.net/ephil

ASP HIGHLIGHT

Convio.com

Modular tools for Web site content management, surveys, events, email messaging, and more. *Best feature:* very complete and integrated set of tools. *Cool factor:* they have the best ASP e-newsletter we've seen.

Organization of this Directory

Because some ASPs offer more than one service, we may have listed them in more than one section, but we often refer you to the description in the Integrated Systems section.

- 1 Integrated Systems (all-in-one, comprehensive complete packages)
- 2 Accounting
- 3 Activism and Advocacy (email and fax systems, legislative advocacy)
- 4 Auctions
- 5 Content Management and Web Site Maintenance
- 6 Data and Database Management
- 7 Distance Learning (e-learning)
- 8 Donor and Membership Management (online fundraising)
- 9 Email Messaging and Listservs
- 10 Event Management
- 11 Intranets and Extranets (Internal and external collaboration networks)
- 12 Hardware and Network Provider (hardware, software, bandwidth, backup)
- 13 Payment Service Providers (secure credit card transactions)
- 14 Surveys
- 15 Volunteer Recruitment
- 16 Web Discussion Forums
- 17 Web Site Tools (search engines, access logs)

1

Integrated Systems

(all-in-one, comprehensive, complete packages)

These ASPs try to offer a complete suite of services and build integration between the tools.

Be sure to ask:

- Can we rent just a few tools at a time?
- Can the tools be customized to meet our needs?
- As we rent more tools, what customer service can we access?

3rdSector.net This ASP offers donor and membership management tools, an online accounting service (through a partnership with NetLedger), and e-commerce modules for selling products and services. They also offer Web hosting and design.

communityapps.com An ASP service launched in May 2001 by the firm IAPPS, their expertise is based on work they've done with foundations. With a suite of Web-based tools for sharing information, site administrator features and hosting package, they offer an integrated solution for facilitating greater communication and collaboration among work groups. This ASP offers free consultation services on creating and sustaining interactive online forums.

convio.com Convio provides highly integrated software that enables nonprofits and member-based organizations to attract, engage, and retain supporters. Featuring browser-based administration, Convio has modules for online fundraising, marketing, advocacy, event management, Web content management, and more. Convio's technology platform integrates all modules and other systems, including fundraising and member databases, so information can be shared easily among an organization's departments. This can give nonprofit staff a complete view of constituent interactions with the organization — useful for cross-marketing, constituent relationship management, and the building of a strong, sustainable donor base. Convio's clients include Planned Parenthood Federation of America, The ASPCA, The Susan G. Komen Breast Cancer Foundation, and Hillel.

eTapestry.com This ASP enables nonprofits to efficiently manage their donor database from remote locations. They combine donor management and contact management in the base package, and other options can be added as needed, including email communications, e-commerce, event registration, planned giving, moves management, and donor login functions. The base system is free to nonprofit organizations with fewer than 500 donor records.

getactive.com This ASP helps organizations use the Internet to recruit and mobilize members. Their Community database enables detailed tracking, reporting, and self-profiling of members. The Messaging Module allows organizations to send personalized, segmented emails in plain text or in HTML. Their Advocacy Module automatically generates branded online advocacy Web sites, then drives traffic to those Web sites using personalized text or HTML email. These three-way communications enable individual members to communicate, via editable faxes and emails, with policymakers selected by the organization. An integrated GetActive Fundraising Module is slated for release in early 2002. All GetActive campaigns are self-serve, and are developed and managed virtually by client organizations. GetActive powers online campaigns for large groups such as the American Lung Association, Environmental Defense, the National Writers Union, and Independent Sector.

groupstone.com An all-in-one online community building ASP that helps nonprofit organizations acquire and retain members, solicit funds, and increase awareness. GroupStone's software enables nonprofit organizations to quickly and easily update their Web sites; conduct targeted text or HTML email marketing, advocacy, and fundraising campaigns; automate inbound email processing; and manage their online communities via forums, surveys, events, and polls. Clients include the United Nations Foundation, the American Red Cross, the League of Conservation Voters, and Cancer Care.

kavi.com This ASP supports workgroup collaboration with secure document repositories, threaded discussions, group calendars and email, voting, and more. Kavi's secure, collaborative sites are backed by a full suite of hosting, content management, event registration, and design services. Customers include the leading technical standards organizations. Members-based and philanthropic organizations can benefit as well.

ASP HIGHLIGHT

SocialEcology.com

Powerful tool to personalize email relationships with thousands of donors, succeed at online fundraising, and send mass e-mailings easily and quickly. *Best feature:* open standards design assures superior integration with in-house systems. *Cool factor:* their tag line is "getting technology out of your way."

ASP HIGHLIGHT

ThePetitionSite.com

Non-partisan tool to build your petition on the Web and to plug into your Web site.

Best feature: it's ingenious because it's so simple to use.

kintera.com Full-service provider Kintera gives nonprofits affordable tools for donor recruitment, cultivation, and stewardship programs. Features include email marketing, customizable fundraising Web sites, event management, community building, and donor management. Kintera is most recognized for its event modules, featuring its proprietary "Friends Asking Friends™" technology. The modules are easily created interactive Web sites where donors, event participants, friends, and family members engage in various activities in support of fundraising events or affinity communities. All data integrates seamlessly to the back-end management and communications system. Clients include National Multiple Sclerosis Society, AIDS Walk, Big Brothers/Big Sisters, and Special Olympics.

localvoice.com A full-service provider that allows a nonprofit to do membership registration and renewals, personalized email marketing, online fundraising campaign management, sell tickets to events, conduct online surveys, and member profiling. This service is an excellent choice for a membership-based organization or an alumni-type educational institution.

membersonlysoftware.com This ASP offers a suite of applications for nonprofit and membership organizations for membership, meetings and event management, fundraising and development, order entry, and inventory. Nonprofit clients include Harvard Medical School Continuing Education, Council on Foreign Relations, and numerous YMCAs.

seeUthere.com A comprehensive technology approach to event management, this ASP allows a nonprofit to learn more about its members, and save money by streamlining event processes. seeUthere features include event marketing capabilities including surveys, participant profiling, email campaign management, etc. Other features include registration, budgeting tools, housing and travel management, real-time reporting, and data analysis. Email messaging is offered as part of a package of other tools.

socialecology.com Offers public Web site content management, private knowledge management, all tied together by an email-centric relationship management platform. Their DonorLink product has excellent event management and survey functionality and their InWeb product offers Intranet services to nonprofits. Social Ecology offers basic Web-based and email-based hosting and discussion systems, and augments those with DonorLink's ability to track relationships and power it all by email outreach.

virtualsprockets.com This full-service ASP offers some excellent advocacy tools for action alerts, petitions, and phone-a-thons. In addition, they offer email messaging and tools for fundraising, site maintenance, sophisticated content management, e-commerce, constituent relationship and membership management, polls, surveys, live moderated chats, Web discussion forums, listservs, and event and course registration. Online event management features include registration with or without payment, capacity tracking and notification, and personalized, system generated confirmation messages. Includes auto-expiring events calendar in list or monthly views.

wego.com This ASP specializes in building portals and communities. They offer an easy-to-use and template-based Web site content management system, plus chat rooms, email lists management, discussion boards, events calendar, polls, surveys, and e-commerce features. Nonprofit clients include Youth for Understanding and National Mental Health Association.

2 Accounting

The ultimate in the virtual nonprofit, these services take your bookkeeping online.

Be sure to ask:

- What kind of security can we expect from such a system?
- How stable is the company? Will this system work with our accountants?
- Is our Board Treasurer comfortable with this system?

3rdSector.net This ASP offers accounting services to nonprofits through a partnership with NetLedger. NetLedger (founded by Oracle boss Larry Ellison) is the first online accounting application for small to mid-size businesses and organizations. It has an easy-to-use interface that's familiar and friendly to both Web users and those who've used accounting applications.

3 Activism and Advocacy (email and fax systems, legislative advocacy)

Advocacy organizations need Internet tools to activate their members. These ASPs allow nonprofits to create action centers to track campaigns, send emails and faxes to selected targets, create online petitions, and track membership activity.

Be sure to ask:

- Will these tools deliver results that will help our organizers win their campaigns?
- Will these ASPs offer tracking tools so we can measure success?
- Are we sure our members will use these tools?
- Can we track which donors use these tools?

actionize.com Offers free tools to create online petitions or to launch email-based public opinion campaigns. They also help with media outreach and consulting.

capitoladvantage.com Specializes in providing Internet content and services to organizations involved in the media and issue advocacy. Their services, including CapitolWiz and State CapitolWiz, can be plugged into an organization's existing Web site by adding in-depth content and interactive services on Congress, the legislators of the 50 state, and other local and regional representatives. One plus about this ASP is that they provide the status of bills, which is something that not all other services offer. Nonprofit clients include California Labor Federation and American Association of Retired Persons.

convio.com See description in Integrated Systems.

getactive.com See description in Integrated Systems.

groupstone.com See description in Integrated Systems.

thepetitionsite.com This Web site operated by environmental portal Care2.com is a non-partisan tool for people working on a variety of issues and causes. It operates like an ASP, even though it's also a portal to petitions. You build your petition on their Web site and then you give out the Web address through emails and Web links to drive traffic. It's ingenious because it's so simple to use. People who sign the petition are given the option to subscribe to an organization's e-newsletter.

virtualsprockets.com See description in Integrated Systems.

ASP HIGHLIGHT

GetActive.com

Community, messaging, and advocacy modules integrate to empower membership-based organizations. *Best feature:* excellent tools enable individual members to communicate, via editable faxes and emails, with policymakers selected by the organization.

Cool factor: they power Scorecard.org.

4 Auctions

These Web sites help charities raise money by helping them run Internet auctions.

Be sure to ask:

- How much time does it take to set up an auction?
- How much help does the ASP provide in publicizing an auction?
- How does the ASP make money: a flat fee, a percentage?

benefitevents.com Online event and fundraising services to the nonprofit community that are integrated with live events and cause related activities. Allows nonprofits to produce an auction, take donations or plan a raffle, and sell tickets securely online.

kintera.com See description in Integrated Systems.

ebay.com/charity Charity auctions are subject to the same rules and fee structure as anything else sold through eBay. Some nonprofits use eBay's regular features to sell "left-over" items from live or silent auctions.

webcharity.com An auction service that specializes in charity auctions. 10% of the auction price goes to pay transaction costs, and 90% of the auction price goes to the charity.

http://auctions.yahoo.com Building off their for-profit auction business, this service offers a charity auction service for no fees, and all the proceeds go directly to the nonprofit.

ASP HIGHLIGHT

eTapestry

Donor management, contact management, email communications, e-commerce, event registration, planned giving, moves management, and donor login functions in one integrated package.

Best feature: base system free of charge to nonprofit organizations with fewer than 500 donor records.

Cool factor: free online seminars.

ASP HIGHLIGHT

Kintera.com

Complete toolset for email marketing, customizable fundraising Web sites, event management, community building, and donor management.

Best feature: their proprietary "Friends Asking Friends™" tool that uses viral marketing to engage people to participate and donate in "thon" events.

Cool factor: the owners mingle with football stars and Hollywood heavies.

5 Content Management and Web Site Maintenance

When an organization's Web site becomes complex to manage, it's worth considering an ASP that offers tools to help with site maintenance and content management. That way the Web site can be managed by multiple people with a Web browser (rather than a shrink-wrapped software program), from any location with Web access.

Be sure to ask:

- How easy is the user interface to use?
- How will we convert our current Web site into this new system?
- Can we keep the same design as we have now?

atomz.com Originally in the search engine business, their Atomz Publish Professional is an excellent solution for site-wide content management. Features includes scheduling and support for multiple site updates. Nonprofit clients include the San Francisco Symphony

communityapps.com See description in Integrated Systems.

convio.com See description in Integrated Systems.

groupstone.com See description in Integrated Systems.

homestead.com This ASP allows a nonprofit to build and maintain a Web site using easy drag-and-drop software at affordable prices. They don't specifically target nonprofits, but we've seen it in use by many small nonprofits who take advantage of their inexpensive prices and very easy to use tools.

kintera.com See description in Integrated Systems.

resourceful.net This Internet company built its expertise in the conflict resolution and mediation field with the development of the portal Mediate.com. They offer some fine site maintenance and content management tools that will appeal to Dot Orgs. Nonprofit clients include Children Now, International Academy of Mediators, EdSource, and over 200 other nonprofit domains.

socialecology.com See description in Integrated Systems.

virtualsprockets.com See description in Integrated Systems.

wego.com See description in Integrated Systems.

6 Data and Database Management

Database management is an important need for nonprofits that rely on these knowledge assets as part of daily operation. You might be a senior citizen support agency that publishes a directory of health care providers, a social service agency that does daily client intake, or an association with thousands of members.

Be sure to ask:

- Who will convert our current in-house database into the ASP system?
- How easy is the ASP system to use?
- What backup systems are in place to safeguard our data?

ctkodm.com Community TechKnowledge provides nonprofits with "technology with a heart" database solutions designed by and for social service professionals. They offer Web-based tools for nonprofit agencies to track and report the impact and efficacy of their service delivery programs. Nonprofit clients include Minneapolis Urban League and Catholic Charities Archdiocese of Denver.

ASP HIGHLIGHT

4Charity.com

Email messaging, Web design, online fundraising, volunteer management, greeting cards, and event registration.

Best feature: skilled consulting teams back up their ASP tools.
Cool factor: the classic ASP, founded by two Stanford MBAs.

ASP HIGHLIGHT

NetworkForGood.org

Run by the AOL Time Warner Foundation they take no fees at all to offer this service to 600,000 nonprofits. They offer a "Donate Now" button that you can add to your Web site for direct access to your giving page.
Best feature: free.
Worst feature: your giving page cannot be personalized with a logo or a unique look.
Cool factor: something really free from AOL.

footholdtechnology.com This ASP specializes in case management and client data tracking of critical day-to-day information. Their software application supports an array of standard activities including: client charts, direct Medicaid billing including accounts receivable and general ledger functions, hospitalization records, property maintenance, personnel, email, government reporting, internal auditing, and employment and training. Nonprofit clients include Community Access of NYC, YMCA of Greater New York, and Depaul Community Services in Rochester, NY.

membersonlysoftware.com See description in Integrated Systems.

7 Distance Learning (e-learning)

You can take literally hundreds of courses in every field including computers, business, architecture, and art history. Nonprofits are now developing and delivering specialized online curriculum by working with ASPs.

Be sure to ask:

- What will it cost for us to develop an online course?
- Who does the work to convert my real-world curriculum into an online course?
- Will the ASP help us get our courses to our members or other students?

isoph.com Provides online courses and more traditional learning options to help nonprofits develop and deploy effective education strategies.

smarterorg.com This ASP offers highly interactive online courses in nonprofit management, technology planning, Web development, and computer applications. In addition, they provide cost-effective systems for nonprofits and funders to develop their own online training programs. Nonprofit clients include CompassPoint Nonprofit Services.

8 Email Messaging and Listservs

There are many different ASPs that provide email messaging for nonprofits. Email messaging is a nonprofit sending email to individuals that have opted to receive email updates. The free ASPs (YahooGroups and Topica) are excellent for beginners, but have limitations when nonprofits want advanced profiling and personalization tools. The more advanced ASPs listed here that specialize in email messaging (Message Media, e2, SparkList) offer more sophisticated tools, particularly for personalization. Finally, we include ASPs that offer email messaging as part of a package of other tools. The advantage of using one of these ASPs is that you can combine your email messaging needs with other tools such as event organizing, online membership renewals with credit cards, volunteer management, and more.

4charity.com This ASP offers email messaging as part of a package of other donor management tools. You can create mailing lists, send email and e-newsletters, and allow site visitors to subscribe from your site.

e2communications.com This ASP is one of the higher-end services that specialize in email messaging. They let you include trackable URLs, provide one-click unsubscribe functionality, have tools to detect whether a subscriber can read HTML email, and let you segment your list based on zip code, gender, issue, or whatever other criteria you've built into your database.

convio.com See description in Integrated Systems.

entango.com This ASP offers a full service email solution of bulk email management with tools for fundraising, membership activation and renewal, event registration, etc., with trackable links, one-click unsubscribe, smart email (HTML v. text), email address list segmentation based on criteria you build into your database, and full ROI reporting.

etapestry.com See description in Integrated Systems.

getactive.com See description in Integrated Systems.

http://groups.yahoo.com Another great, basic, free service that you can use to distribute an email newsletter or set up an email discussion forum. You cannot use your own domain name when you send out emails. Some minor Yahoo branding will appear at the bottom of every message. An archive of your messages is stored on the YahooGroups Web site. This archive is full-text searchable and it stores any attachments that were originally sent.

groupstone.com See description in Integrated Systems.

kintera.com See description in Integrated Systems.

localvoice.com This ASP offers email messaging in a package of other donor management tools. You can create mailing lists, send email and e-newsletters, and allow site visitors to subscribe from your site. In addition, they also offer tools for fundraising, member activation and renewal, event management, member profiling, surveys, branded email, chat rooms, and site search engines.

messagemedia.com This ASP is one of the higher-end services that specializes in email messaging. They let you include trackable URLs, provide one-click unsubscribe functionality, have tools to detect whether a subscriber can read HTML email, and let you segment your list based on zip code, gender, issue, or other criteria.

seewhere.com See description in Integrated Systems.

socialecology.com See description in Integrated Systems.

sparklist.com This ASP is one of the higher end services that specializes in email messaging. They let you include trackable URLs, provide one-click unsubscribe functionality, have tools to detect whether a subscriber can read HTML email, and let you segment your list based on zip code, gender, issue, or other criteria you've built into your database.

topica.com A great, basic, free service that you can use to distribute an email newsletter or set up an email discussion forum. You cannot use your own domain name when you send out emails. Some minor Topica branding will appear at the bottom of every message. An archive of your messages is stored on the Topica Web site, but that archive is not full-text searchable, nor does it store any attachments that were originally sent.

virtualsprockets.com See description in Integrated Systems.

ASP HIGHLIGHT

CommunityApps.com

Powerful collaboration product to share documents and ideas, schedule meetings, and manage knowledge.

Best feature: Ideal for funder networks.

Cool factor: amazing Web designs.

9 Event Management

Organizing events is an important function of nonprofit organizations, whether it's an annual conference or a seasonal fundraising event. Here are ASPs that specialize in helping organizations organize events, conferences and other activities that require outreach, marketing, RSVP, and member profiling.

Selection questions:

- How do you integrate these ASP tools into your agency's current activities?
- How do you mix online event management with people who aren't online?

acteva.com An online event management service that includes reservation, registration with payments, contributions, and membership capabilities, and reporting features enabling organizers to reformat/reuse the data in their development activities or future events. All hosting is done by Loudcloud, the industry leader, and is available 24 hours, seven days a week. Nonprofit clients include: Peninsula Humane Society, Santa Clara Ballet, and United States Chaplain Association.

ASP HIGHLIGHT

VolunteerMatch.org

Enables nonprofits to set up a volunteer matching system to recruit volunteers.

Best feature: Integrates into Volunteer-Match's national portal with high traffic volume.

Cool factors: They're a nonprofit, and they won two Webby Awards in 2001.

ASP HIGHLIGHT

eGrants.org

This not-for-profit company offers secure online credit card collection services for its nonprofit customers.

Best feature: they excel at understanding nonprofit needs.

Worst feature: they don't offer any other services. What their customers say: we trust this ASP because they're a nonprofit.

Cool factor: their offices are in the Presidio National Park.

convio.com See description in Integrated Systems.

kintera.com See description in Integrated Systems.

localvoice.com See description in Integrated Systems.

seeUthere.com See description in Integrated Systems.

socialecology.com See description in Integrated Systems.

virtualsprockets.com See description in Integrated Systems.

wego.com See description in Integrated Systems.

10 Fundraising and Donor/Membership Management

These ASPs offer tools to interact with your donors via the Web and email, evaluate donation trends, perform surveys, do event management, and more.

Be sure to ask:

- How do we synchronize the data in our in-house donor database with the data on the Web?
- How do we set up customized "thank you" Web pages and emails that will be sent to donors as acknowledgement of their gifts?

3rdSector.net See description in Integrated Systems.

assetstream.com This ASP specializes in letting donors make stock donations online (or over the phone). Their online stock processing system tracks gifts from start to completion, and automatically delivers tax receipts. Their Stock Donation Calculator shows donors the power of stock gifts by highlighting how much more they can give via stock versus cash. They offer several pricing options based on volume. Institutional brokerage fees nonprofits would normally pay to sell gifts of stock are not included in AssetStream's fees.

contribute.com Enables donors to make contributions from a nonprofit's Web site by building customized donation forms branded with a nonprofit's identity. No setup fees or annual subscription fees, but they collect a processing fee for each contribution. Nonprofit clients include San Francisco Zoo, California Abortion Rights Action League, and Monterey Bay Aquarium.

convio.com See description in Integrated Systems.

entango.com Provides secure, reliable credit card transaction processing, reporting, and receipt fulfillment. Ideal tools for online fundraising, membership activation and renewal, event registration, and email management in real-time.

eTapestry.com See description in Integrated Systems.

getactive.com See description in Integrated Systems.

groupstone.com See description in Integrated Systems.

kintera.com See description in Integrated Systems.

localvoice.com See description in Integrated Systems.

socialecology.com See description in Integrated Systems.

virtualsprockets.com See description in Integrated Systems.

11

Group Collaboration

(Intranets and Extranets, virtual offices)

ASPs offer some excellent tools to allow individuals within an organization to share information and to collaborate, share contact lists, calendars, listservs, and bulletin boards. You can also restrict membership to ensure that your information is kept within your group.

Selection questions:

- Who in your organization will be the manager of the system?
- How do you get buy-in from your network of potential participants?
- How will you train your network of participants to use the system?

communityapps.com See description in Integrated Systems.

communityzero.com This ASP is an interactive Web site that allows a group of people to communicate and exchange information over the Internet in their own private and secure area. Within each area, called an online community, participants are provided access to a suite of tools that enable a group to effectively get organized, share knowledge, and communicate.

greenmediatoolshed.org Provides media-related tools and information to its members (mostly environmental nonprofits) so they can more effectively project their messages to the public and decision-makers. Offers discussion forums for either public interaction or private networking, in addition to surveys, media libraries, polls, and media training resources.

intranets.com This ASP offers a package of services such as personalized email, document management, group calendar, group discussion, members directory, digital rolodex, instant messaging, content streaming, Web hosting, and more.

visto.com This ASP offers a free package of services such as email, address book, calendar, online file storage, online group collaboration, Web bookmarks, and to do lists. Wireless access available.

12

Hardware and Network Providers

(hardware, software, bandwidth, backup)

In addition to leasing software like most ASPs, companies are emerging that not only provide basic software but also hardware, networking, Internet access, email, and backup service - all in one package. Sometimes known as Full Service Providers, they let you lease all the equipment, software, and other parts of an Information Technology system for a monthly fee.

Be sure to ask:

- Is it worth the cost, based on our organizational needs?
- What will happen to our existing hardware and software?
- What is the buy-out cost if we stop using the service?

centerbeam.com A service that builds and manages computing systems. For a monthly fee they outfit an office with everything - a complete wireless network, fast, dedicated Internet access with DSL, new desktop and laptop PCs, printers, email, and technical support. Plus an Intranet, nightly data back-up, disaster-recovery, and a customer care team to keep you up and running. A single service, for a single monthly fee, from a single vendor.

ASP HIGHLIGHT

Zoomerang.com

Popular online survey service that is easy to set up, with a free service for limited use and a 30-day lifespan.

Best feature: Results in real time so you can monitor responses.

13

Payment Service Providers

(secure credit card transactions)

These services allow you to accept payments and donations online through credit card processing and other tools such as shopping carts.

Be sure to ask:

- What is the fee structure?
- How often does the ASP wire us the contributions we've received?
- How do we integrate the donor data into our in-house system?

4charity.com A for-profit that's mostly a charity mall but is evolving into a charity portal. Small list of charities, but they offer a "Donate" button for the nonprofit's Web site.

charityweb.com A service that allows a nonprofit to accept donations from its Web site via credit card, check, or electronic funds transfer. They also offer shopping cart services.

donate.net A service to manage online credit card donations to your organization, in addition to tools for event registration, member registration, and product sales. Organizations can use their own merchant accounts or use a merchant offered by Donate.net. Nonprofit clients include Atlanta Humane Society, Endometriosis Research Center, and Atlanta Jewish Film Festival.

echarity.com A for-profit directory of 500 nonprofits. No "Donate Now" button for nonprofits.

egrants.org A nonprofit, "Internet foundation" that focuses on online fundraising for nonprofit groups working for positive social change, healthy communities, and a sustainable environment. They offer a directory of their groups and a "Donate" button for the nonprofit Web site.

entango.com A service that specializes in secure credit card processing for nonprofits. They handle the Internet merchant account setup.

networkforgood.org Network For Good (formerly Helping.org) is run by the AOL Time Warner Foundation, and allows your nonprofit agency to accept credit card gifts through a page about you on their Web site. They charge no fees at all, clearly one of the best deals on the Web for nonprofits. A downside is that your page on Network For Good cannot be personalized with your logo or other navigational items.

localvoice.com A provider that allows a nonprofit to do membership registration and renewals, personalized email marketing, online fundraising campaign management, sell tickets to events, conduct online surveys, and do member profiling. This service is an excellent choice for a membership-based organization or an alumni-type educational institution. Their donor system integrates well with in-house donor databases.

paypal.com Highly popular service for auction buyers, this easy-to-use service is also useful for nonprofits because it's a recognizable brand on the Internet. Both seller and buyer have to be registered. Good for gifts and contributions, or to enable an online store.

ASP HIGHLIGHT

Utne Communities

(www.utne.com/
communities)

Same company that publishes the progressive magazine, this tool gets rave reviews from its users for threaded discussion.

Best feature: they offer amazing customer support and training.

Cool factor: their product powers the Webby Award-winning Café Utne Web site.

14 Surveys

Surveys are so easy to conduct over the Internet, it's no wonder that everyone's trying them.

Be sure to ask:

- Do the free services offer enough value and features?
- Can we customize the look and feel of the survey?

beachtech.com Offers Eform, an email and Web form to conduct online surveys. Puts survey data into an online database, which then generates reports in several formats, including HTML. Eform is priced based upon the maximum number of participants in a survey or form. You may have as many forms as you wish, but no single form may contain more than your limit of respondents. No free product options.

convio.com See description in Integrated Systems.

greenmediatoolshed.org Provides media-related tools and information to its members (mostly environmental nonprofits) to project their messages to the public and decision-makers. Offers discussion forums for either public interaction or private networking, in addition to surveys, media libraries, polls, and media training resources.

groupstone.com See description in Integrated Systems.

localvoice.com See description in Integrated Systems.

supersurvey.com This ASP specializes in online surveys and allows users to use their Web-based interface to design a survey, invite respondents, and begin tabulating results. Discounts for nonprofits.

surveyhost.com Offers online survey tools, complete reporting capability, passwords protection if required, field checking, branching so respondents see targeted questions, instant reports to monitor responses, and email invitations with merged information.

virtualsprockets.com See description in Integrated Systems.

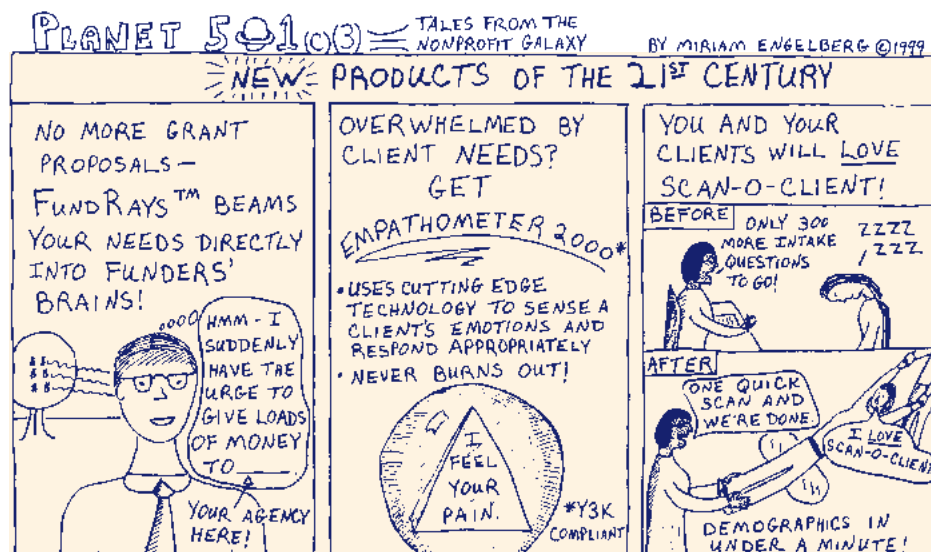
wego.com See description in Integrated Systems.

zoomerang.com This ASP specializes in online surveys. They offer a free online survey service for limited use and a 30-day lifespan, and upgrades to a fully-featured version.

ASP HIGHLIGHT

Entango.com

Reliable credit card transaction processing, reporting, and receipt fulfillment, seamlessly integrated into a nonprofit Web site. *Best feature:* been around for a while and a trusted provider to nonprofits.



15 Volunteer Recruitment

Increasingly, nonprofits are turning to the Internet to recruit volunteers to help them with all aspects of their programs.

Be sure to ask:

- Will the ASP offer us enough features to make using it worthwhile?
- Does the regional and national reach of the ASP bring useful volunteers to us that we couldn't reach on our own?

groupengines.com This for-profit ASP is a portal for nonprofit volunteers. Nonprofit agencies can search their database to find volunteers with specific skill sets, or use it as an ASP to manage volunteer inquiries and correspondences in one place.

volunteermatch.org This nonprofit service enables potential volunteers to find volunteer opportunities anywhere in the U.S. by ZIP code, category of interest, and keyword. This ASP can be integrated into a nonprofit's Web site, offering simple, effective tools for recruiting, managing and communicating with volunteers online.

16 Web Discussion Forums

Adding a Web discussion forum to your Web site is a key way to build an online community and to engage your audience to get involved with your projects. Here are some ASPs that offer Web discussion forum tools that you can plug into your Web site.

Be sure to ask:

- How do these services integrate into our Web site?
- Do we like the threading interface of the forum?

ezboard.com Free Web forums and message boards.

kintera.com See description in Integrated Systems.

utne.com/communities This is the same Utne that publishes the progressive magazine, and this tool got developed as part of their Webby Award-winning Café Utne Web site. These folks are experts at the human aspect of online community, and in addition to offering the technology, they also help with community architecture, training, promotion and marketing, and event launches. Nonprofit partners include Alternet.org and the Southern Poverty Law Center.

yourBBS.com Offers a powerful message forum, complete with a collapsible threaded engine and easy to configure options, such as a ban list, file uploads, spell checker, or even requiring a password to access your forum.

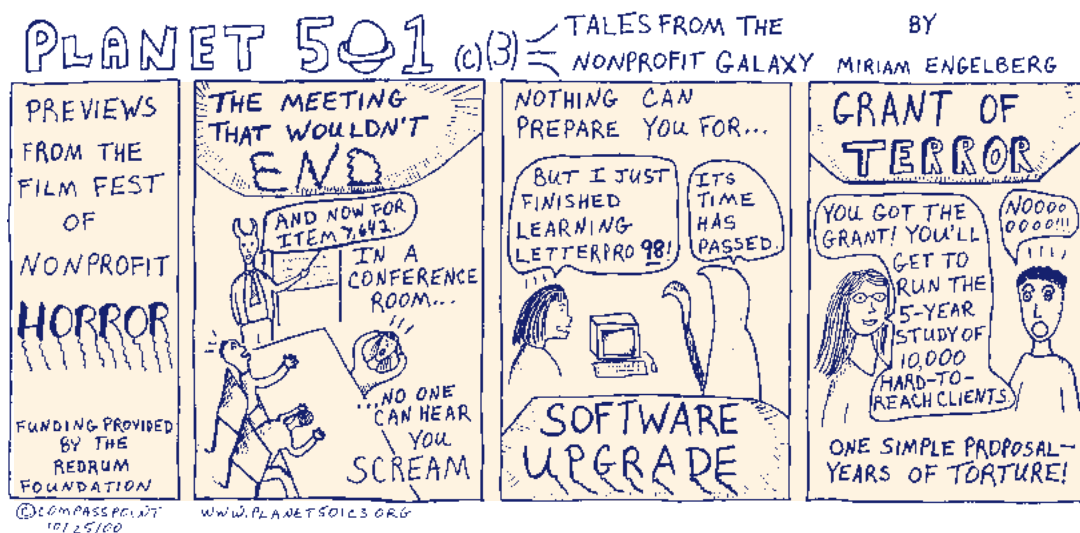
ASP HIGHLIGHT

WebTrendsLive.com

Allows you to track how many hits your Web pages are getting.

Requires some Java code to be installed on those Web pages. It shows hits to pages, most popular, referrer logs, browsers used, and more.

Best feature: The traffic reports are available on the Web Trends Live Web site in real time; no software to download.



17

Web Site Tools

(search engines, access logs)

With these types of services, you can plug a tool into your Web site for free, and then upgrade to more powerful services. The services are free because they want to introduce their products to new customers, who will then upgrade to the fee-based services.

Selection questions:

- Are the free services useful enough for your needs?
- At what point might you need the rental services?

atomz.com Help visitors to your Web site find the section they're looking for by putting a search engine on your site for free, and then upgrade to more powerful services. Nonprofit clients include SETI Institute and San Francisco Symphony.

cast.org/bobby An ASP that's not just for nonprofits is the "Bobby" site that evaluates Web sites "on the spot" for how accessible they are to people with disabilities. Go to the site and type in your Web address and it will show you the areas at your site that need improvement. If your site is "Bobby approved," you can apply to have a little bobby icon for your home page.

freetools.com Free tools to plug into your Web site including polls, message boards, guest books, and search engines.

mycomputer.com Offers tools that add functionality such as site counters, statistics tracking, search features, message boards, and more.

searchbutton.com Put a search engine on your organizational Web site for free, and then upgrade to more powerful services if you need them.

searchengine.com Put a search engine on your organizational Web site for free, and then upgrade to more powerful services.

webtrendslive.com This ASP offers a free "Personal Solution" service that allows a nonprofit to track visits to an unlimited number of Web pages but requires some Java code to be installed on those Web pages. It shows hits to pages, most popular, referrer logs, browsers used, and more. The traffic reports are available on the Web Trends Live Web site. More full featured versions of this service are available for monthly fees.

ASP HIGHLIGHT

Atomz.com

Offers powerful search engine tools in addition to a new Web site content management service.

Best feature: Use their free service to add a search engine to your site.

4

A Detailed Guide to Selecting an ASP

INSIDE THIS SECTION

- Managing the selection process
- The process of selecting an ASP
- Defining your needs
- Applying your selection criteria

Manage the Selection Process

In the first part of this Guide, we gave you ten ASPs that can be used quickly and easily, without having to create a selection process or developing criteria. But in some cases you'll want to use ASPs that are expensive, require a good deal of time to implement, and as a result, warrant more time and attention to select the right one.

Managing the ASP selection process means assembling a team to conduct an organizational needs assessment, evaluate ASPs using criteria the team determines are necessary, make a selection decision, and assist with implementation. In small organizations, the team may be only one or two people. Any team should include the user or users of the system – those who do input and those who use the outputs.

Small organization or large, time will need to be spent by the team members. Your staff's available time, their familiarity with the organizational needs you are acting on, and their familiarity with technology affect time frame, so keep those factors in mind when planning.

In addition to assembling a team, be sure that you designate one project leader in your organization who will be responsible for managing the selection process. This leader will guide the exploration and decision phase.

Here are the tasks that will need to be undertaken for a thorough process:

- ▶ Identify a staff person at your nonprofit who, among their other duties, will play the role of ASP Coordinator. This person will likely be function-oriented. For example, if you need a donor management solution, it will likely be a person from your development staff, or if you are looking for an accounting solution, someone from your finance department. Pick a person from the group affected by this solution.
- ▶ Assemble a small team of staff, board, volunteers or others that are affected by your current process, whether it is collecting donations or managing your database, who will work on the ASP project.
- ▶ Your ASP Coordinator works with the team to conduct an internal needs assessment (see section "Identify Your Needs and Desires" beginning on page 33).
- ▶ Research, evaluate, and select an ASP that fits those needs.
- ▶ Conduct planning meetings with the ASP to plan for implementing the technology.
- ▶ Work with staff to address the ASP's operational impact, including any staff training needs.
- ▶ Work with the ASP to complete implementation, testing, and launch of your technology solution.
- ▶ Go live with the ASP service, including staff training, outreach to constituencies, and stakeholders.
- ▶ Conduct ongoing monitoring of ASP operational impact, provide regular reporting of ASP activity, troubleshoot any technology or operational problems, and monitor ASP software upgrades.

Real Stories

Colette Washington, Children Now, Oakland. www.childrennow.org. They work with *GetActive.com*.

"It was a process Children Now gave very careful consideration to. We involved the entire staff in an initial needs assessment survey and then conducted several meetings with Children Now decision-makers. ASP representatives conducted online software demonstrations for key staff at Children Now so we could get a sense of how to make a system work for us. We utilized an outside consultant to help research and compare several ASP systems and options. We conducted phone interviews with ASP representatives as well as with some of their current clients. The process took place over a period of about four months: anytime you have a large number of people involved in a major organizational decision, varying opinions need to be factored into the timeline. However, the process at Children Now streamlined as we got closer to making a final decision. We designated a smaller team of decision-makers including myself (the Internet Coordinator), the Vice President, and the directors of the Policy and Communications departments. I did manage the selection process, and in the end, made a full recommendation to the decision team for our best choice."

Eddy Shires, Texas Dental Association, Austin. www.tda.org. They work with *Convio.com*.

"It wasn't easy, because we are amateurs. Ours was certainly a dynamic process with so many actors. In hindsight though, having so many different actors, ideas, concepts, and approaches was very productive. Convio respected and responded to all those ideas, one by one."

Identify Your Needs and Desires

Once you have a basic familiarity with what ASPs might offer you, conduct a needs assessment to determine how you expect an ASP to help. During the last several years, many nonprofits have been approached by ASPs that are marketing particular services, resulting in nonprofits being in a reactive mode when considering a particular service. "This ASP is offering services that our agency needs, so why don't we just go with them?" is the familiar refrain. This type of reactive decision-making prevents nonprofit staff from considering the whole picture of what their broader needs are. We recommend proceeding with a needs assessment that defines desired outcomes, reviews organizational processes, and examines technology needs.

Let's look at some issues to help guide your ASP selection process, along with some representative examples.

Define a mission for the project

It's helpful to write a mission statement for the ASP project, with a clear statement of your desired outcomes. It's also helpful to attach a few additional core issues that are relevant to the problem you're trying to solve. Here are three examples:

Mission statement 1: *My statewide nonprofit needs a software system that will allow us to accept credit card contributions over the Internet and that will allow us to merge that data with our current in-house donor tracking software. We're not sure if our current donor tracking software can help us do that. We'd also like to consider whether our entire donor tracking system needs to be revamped from scratch, and do our credit card needs fit into such a revamp? We have two offices, separated by 600 miles, and we'd ideally like people from both offices to access the donor tracking software.*

WHAT IF?

...our board is dead set against this?

Sometimes these kinds of proposals bring up issues that are separate from technology. If board members are dead set against it, have a meeting to explore resistance. Why are they opposed? Are they right? Can they be convinced and if so, how? Is it worth the fight?

WHAT IF?

...I need a solution in a week?

Although good decisions often come from a methodical process, this is not always possible. You may need to speak informally with other people or agencies that had a similar need to see what their solution was and how it worked (or didn't) for them, and then trust that the same solution will work for you. Sometimes it is the only way you can move on an issue.

WHAT IF?

...I have no time for a needs assessment?

Some ASP solutions may not require a detailed needs assessment. At the very least, understand what solution you need, how much you want to spend, and who will manage the process. Meet with all those involved in the current process to discuss implementation. Involve them when looking at possible solutions, and again to make a decision. The more involvement from others, the better choice you can make, even if it is made with limited information.

Mission statement 2: *My land trust needs software to run its growing Web site. On a weekly basis there are now dozens of Web pages that have to be added, updated, or removed. Our full-time Web person wants to streamline the process. We want to make it possible for other program staff to update the content on the Web site too, so that all the work doesn't have to bottleneck through one person.*

Mission statement 3: *My nonprofit needs a software system that will allow our national scientific advisory board to have a more effective way of interacting than through email. Here is a prioritized list of needs:*

- ▶ *The system needs to be password protected so only authorized scientific advisory board members can gain access (highest priority);*
- ▶ *The system needs to show a list of scientific documents that we are asking our advisory board to review (highest priority);*
- ▶ *The system should allow to post either Microsoft Word or Adobe Acrobat PDF files for download (highest priority);*
- ▶ *The system should have an archive of old documents that were previously reviewed (highest priority);*
- ▶ *The system should offer a threaded discussion board to allow discussion among our advisory board about the policy issues that are being debated (highest priority);*
- ▶ *The system shouldn't cost more than \$15,000 per year to operate (including staff time), because that's what a funder is giving us (highest priority);*
- ▶ *The system should offer a simple online calendar that helps advisory board members schedule upcoming meetings (medium priority);*
- ▶ *The system should allow the site administrator to track which documents have been read by which advisory board members (low priority).*

Review organizational processes

Review the operational aspects of the problem you are trying to solve: look at how you handle the current operation, how your staff is allocated, and how you deal with training and turnover. Ask yourself a series of questions about how you work and what you need to complete your tasks. What work products do you create through this operation? What do we need from outside sources to begin working? From internal sources? What is the exact process now? Is this process the most effective and efficient it can be or can improvements be made? What would our ideal process look like? Take the time to fully analyze your processes and determine exactly what you need to make the process work well. Ideally, working with an ASP should strengthen these organizational processes and lead to better efficiencies.

Examine technology needs

A technology assessment can help you understand how technology, hardware and software impact the problem you are trying to solve. How reliant are you on certain technologies? Are you aware of any limitations that your current technology choices have created? Are you able to identify specific improvements that would improve your operation? How do budgets impact your technology decisions? How does your staffing situation limit what you can do with technology?

It is critically important to have a stable Internet connection and a stable computer network to use ASPs. No matter how good an ASP's service, if you cannot access it in a stable manner you are not getting the best value out of it. It makes sense to invest in your network and make sure it is well maintained to keep problems at a minimum.

Examine staffing needs

Look at the skills of the people who will use the ASP. Do their general technology skills need updating or improving before they begin training on using the ASP? Exactly what training does the ASP provide? Is it a custom training for how your organization will use the software, or a general course about how the software works? If there is only general training available, it is smart to develop an in-house training. Documenting this training will help ensure the knowledge stays with the organization. Not only should a primary and secondary person be trained, there should be a plan to transfer that knowledge when there is turnover.

Identify any potential gatekeepers of information or of technology in the organization who may create a roadblock to the process, or who may make the process more difficult. Work to get their buy-in, or ascertain if there is a way to work around them.

List and prioritize the features you need from an ASP

List all the outcomes you want first. Then list the features you think you might want an ASP to perform for you. At this stage, it's not necessary for you to know what features specific ASPs can provide, since you'll get to that later. Along with listing features, prioritize how important each of those features might be.

Determine your current use and estimate your future use

Be sure to talk to staff who are involved in the process you are looking to improve to see how they are using your current software. They will know how to improve the process, and what features will be especially useful. If you also involve them in the actual selection process, they will know first hand why something they recommend will or will not be available. Good ideas are always worth changing systems, so do seek another way if the ASP cannot deliver a particular solution.

Try to estimate how many hours per week cumulatively go into using the software now. Some software can track this for you, or you can buy a tracking software to track use if it is on a large scale. Calculate your total software cost (staff time, purchase, upkeep) and divide it by the number of hours you use the software in a specific time period. Use your best guesses, and the cost of the ASP, to see how the ASP will compare to your current costs per hour over time.

Needs Assessment Tips

① Bringing people together can illuminate problems that are never discussed or things that may not be working well, but "have always been done that way." It can be enlightening for those involved to know what effect their actions have on the others involved, and may be even more enlightening for the manager responsible for the process to see what the "whole" looks like. Encourage honest evaluation of the current process to understand what you're trying to improve.

② If the ASP software solution you are considering will have a major organizational impact, it is important to thoroughly assess how the organization currently handles the information that the software will handle. If you are just adding a function to your Web site, you may not need an extensive process, but it is smart to know how you handle the function currently.

NONPROFIT ADVICE TO ASPs

"Listen to what we need. Don't sell us a BMW if we need a Chevy, but give us some options to grow. Understand that nonprofits will be giving recommendations of your services and treatment to other nonprofits. Nonprofits can likely be your most loyal customers, but don't take advantage of what you may perceive as "inexperience with business matters."

— Leslie Byster,
Silicon Valley Toxics
Coalition,
San José.
www.svtc.org

WHAT ASPS TOLD US

"From the ASP provider standpoint, I walk a fine line between helping an organization evaluate whether my tool is the right one for them, and telling them they're not ready. I've developed some guidelines that I posted on our Web site to guide organizations in their decision."

— Eve Smith,
formerly of Interactive
Applications Group,
Washington, DC.
www.iapps.com

Real Stories

Colette Washington, Children Now, Oakland. www.childrennow.org.
They work with GetActive.com to engage their supporters on advocacy issues.

"Children Now conducted an in-house survey with all staff and the following were all suggested: tracking legislative, regulatory, and media activities at the state and federal level that affect children's lives; periodically contacting registered users by email to recommend that certain actions be taken via fax, email, phone, or letters; tracking user activity on actions taken or not taken to help customize our action alerts; and contacting registered users to provide updates on actions taken. We quickly found that we would need to prioritize our 'wish list' and be on the lookout for a company that was both flexible and willing to grow with our needs in mind."

Brian Lacy, University of Connecticut Foundation, Storrs, Connecticut. www.foundationuconn.edu
They use Entango.com to handle online credit card donations.

"We compared ASPs based on costs, existing clients and by reviewing their demo sites. In order of importance, the following factors were considered: cost, customizable, client list, strength of demo site, customer service, and, finally, speed of set-up."

Andrew Huang, Alley Theatre, Houston. www.alleytheatre.com.
They work with Convio.com to manage their Web site.

"The main in-house issue was to allocate some money to the Web site. Convio was not free and we had not been paying anything for our site. We had to convince our Managing Director that our Web site was important and also convince him that Convio was the answer to our problem."

Find ASPs to Consider

We've already discussed the challenges that nonprofits face when being approached directly by ASPs offering their services. There are five key techniques that we recommend:

- ▶ Scan the listings of ASPs that are offered by NonprofitMatrix.com, TechSoup.org, and Actknowledgeworks.net/ephil to find services that match your needs. See "Further Resources" in this Guide for more details on how to use these two resources.
- ▶ Visit the TechSoup.org Community Center Message Boards to ask questions and read discussion threads that discuss specific ASP services.
- ▶ Talk to other nonprofits about the ASP. Try to find organizations that use the service in the same way you plan to use it, and get their thoughts on how it works. To find other customers, ask ASPs themselves, ask on listservs, and talk to people and board members you know. The three key questions to ask are: How do you use the service? What was your setup experience? Is the company's Technical Support helpful? But remember, no matter how happy others are with the service, if it doesn't meet your needs, it will not succeed.
- ▶ Wander the vendor rooms at local nonprofit conferences and events.
- ▶ Talk to technology consultants that have helped you in the past. Some know about ASPs that serve nonprofits.

Real story

Garth Moore, ASPCA, New York. www.asPCA.org. *They work with Convio.com.*

"TechSoup.org was a great help in finding out what other not-for-profits are doing. The NYC Webmaster group organized by David Milner is another big help. Otherwise, we were left to our own devices."

Apply Your Selection Criteria

The next stage in the process of selecting an ASP is to apply your selection criteria to the ASPs you have identified. Not all the criteria will be of equal importance to every nonprofit agency, so it's important to prioritize them as you move forward in the selection process.

👉 Features and System Functionality

Use your prioritized list of features to match up with the features offered by the ASPs you are evaluating. It's not always possible to have all your needs met by one ASP, so use your prioritization to determine where you are getting the most important needs met and the best value. If you will only benefit from certain features, you may not use (or need to pay for) the complete package of services.

👉 Pricing

Many ASPs charge different prices for different groups of services. Some ASPs provide services that cross categories of service. Others create "bundles" of different services in different configurations to meet differing needs. Sometimes bundles are different from ASP to ASP, making comparing services and prices more difficult. Sometimes there are bundles that are still missing something you need, so you must search for two (or even more) companies. There can be differences in how services are billed, such as a flat fee, fee per month, or per transaction.

This is the time where the results from an organization's needs assessment are invaluable. Your requirements, identified in a needs assessment, will give you something to compare your options against, rather than trying to compare services that don't match. Ask about customizing packages if you find one close to your needs. Be sure to include any setup fees or other "service initiation" fees when evaluating costs.

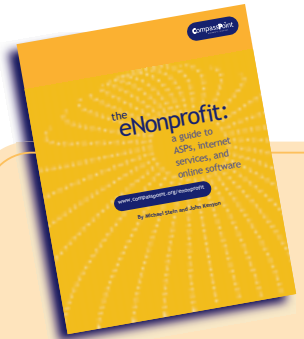
Since ASPs usually charge a monthly fee, the cost is ongoing. Take that into consideration when evaluating the cost of an ASP versus the cost of a boxed software program. Over time, the monthly rental cost will eventually exceed the cost of the boxed software, but an analysis of the other benefits and outcomes may prove this a good value.

👉 Frequency of Product Upgrades

Knowing how often an ASP upgrades its software products can be an important factor in figuring out their business goals, their commitment to serving customer needs, and their interest in communicating with their customers. Ask the ASP directly about how often they upgrade their product, how they determine upgrade needs, and how they communicate upgrade news to customers. Their answers to these questions should inspire confidence and trust. Evasiveness, lack of response, or unclear responses are signs that this ASP is a risky selection.

👉 Ability to Customize

For organizations that are used to a high level of control over their software, and the ability to customize that software, potential loss of that control can be a serious downside compared to an ASP. Most ASPs provide pre-built products that are not customizable, although some can customize their product to your needs. Consider how (and if) the product will change as your needs change. Is it possible to change how the application functions at all? If so, exactly how are changes made – by the ASP, or are you responsible for creating any changes? If not, might your needs change enough to require changing services? If the ASP is able to make changes, how will that process work? What kind of time frame can you expect for different types of changes, minor and major? The timeframes on major changes to databases can run into many months, depending on the change being made. What is the limit on how much you can customize the service, and do those limits constrain your organization's needs?



GUIDE TIP

Visit the TechSoup.org Community Center Message Boards to ask questions and read discussion threads that discuss specific ASP services.

NOTE TO LARGE NONPROFITS:

It is smart to weigh all of your costs of maintaining the systems internally against the ongoing cost of the ASP. Be sure to include all of the costs associated with recruiting and retaining staff over time, along with the expenses of the technology. Remember to weigh the value of the control you lose when outsourcing this function against the savings it may generate.

👉 Customer Service

Getting decent customer service from a technology company is often a problem, and ASPs are no different. When selecting an ASP, inquire how the customer service department is run, how many staff there are, whether they take toll-free calls, and what hours they are open. Ask how much customer support you get with your regular service contract, or if you need to pay for additional service. To have a realistic idea of the level of customer service your prospective ASP provides, pretend to be a customer and contact them. Call any support numbers you have, see how long you are on hold, how the representative is at answering questions, and ask what types of calls they usually handle.

Another aspect to customer service is the safeguards that are in place against hardware problems, and how the ASP has planned for disaster recovery. Ask the ASP to describe their last hardware problem and what steps they took to solve it. How did that problem affect their customers? Was access to data affected? Was service down, and if so, for how long? Were the customers notified immediately, or at all? What information were customers given about the issue, and when?

Real Story

Elana Mendelson, Rehabilitation Institute of Chicago. www.rehabchicago.org.
They use 4Charity.com.

"Customer Service was a big factor. I spoke with many sales people, and if they wouldn't talk to me on the phone or in person, I knew it wasn't a company we should be working with."

👉 Privacy Concerns

Nonprofits have highly sensitive data including names and addresses of contributors, supporters of controversial causes, recipients of legal and immigration services, etc. Make sure you feel confident about how privacy issues are handled with an ASP. Since many ASP-related projects involve asking supporters for email addresses, credit card numbers and other personal information, be sure to choose an ASP that does a good job in handling this data. It is a good idea to review your current privacy practices, to make sure they are effective and that you are in compliance with any applicable laws. An ASP is merely a container for your data. You are responsible for any confidential data that passes through your organization.

Selection Tip:

Look at your current costs to see if you are getting a better value. If you are paying more, what are the benefits that come with the ASP worth to you? Remember to include the costs of staff time currently needed to get this job done. Will you have savings that you can demonstrate by using the service? Will you be able to demonstrate the value over your current process to yourself and your board?

Implementation Tip:

Who will your staff call when there is a problem? Do they contact the ASP directly? What types of questions will have to be answered by your own staff and which can be directed at the ASP? Some services offer more comprehensive support for an additional fee. With some services, you may be assigned a dedicated customer service representative to contact directly, who may be more helpful than an anonymous service representative.

Have a clear understanding of who owns your data, now and in the future. Does ownership change if the company changes hands? Are there certain conditions where you may give up ownership of some or all of your data to the ASP? These issues can be deal breakers, so examine carefully any language or terms that the ASP presents around this issue.

Business Stability

With so many ASPs going out of business in the last few years, selecting an ASP is sometimes compared to buying stock from a startup Internet company. There's no sure way to know how long a company is going to be in business, but here are a few techniques you can use:

- ▶ Ask about the long-term interest of this company in selling to the nonprofit sector. Ask about their business stability and ask to see an audited financial statement. See how they handle these questions. Your goal is to determine their willingness to share their business strengths and weaknesses with you, and to determine if they have sound financial backing.
- ▶ Find out how long the company has been in business. Ideally, choose a company that has been in business for a year or more (so they've completed at least one fiscal year), and upgraded their software product more than once.
- ▶ Look for ASPs that have created nonprofit community advisory boards to advise them in their business and marketing development.
- ▶ Ask the ASP about their contingency plans if they were to close down or be acquired by another company. How would they address your needs in this eventuality? Make sure that you understand how you would get access to your data stored in their system.
- ▶ Ask for references from other nonprofits that have worked with that ASP. Ideally you want to see a sizeable nonprofit client base as a demonstration that this ASP is able to serve nonprofit needs.
- ▶ Obtain the Dunn and Bradstreet report for the ASP you are considering.

WHAT ASPS TOLD US

"When talking with a prospective client, the question I consider is 'does the nonprofit have the institutional capacity and readiness to integrate technology into their organizational communication and practices?' Without internal support and resources, I know they'll have a difficult time sustaining their online community."

— Eve Smith, formerly of
Interactive Applications
Group, Washington, DC.
www.iapps.com

Real Stories

Erich Foeckler, Being Alive San Diego.

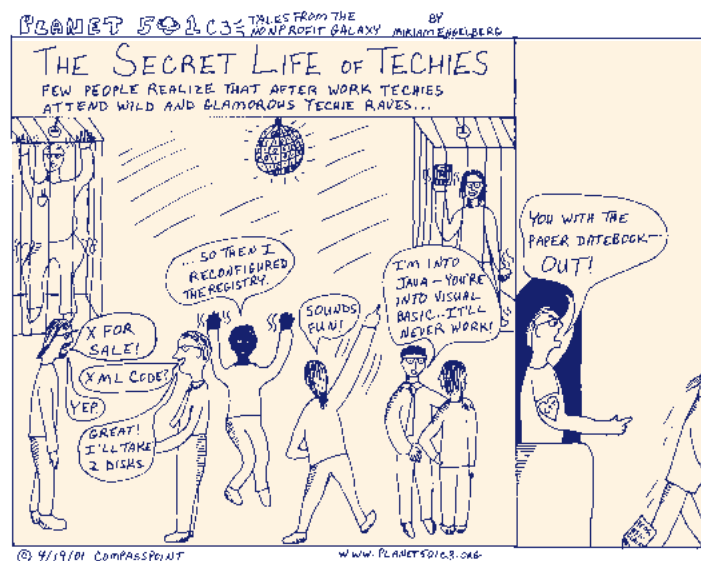
www.beingalive.org. They work with eTapestry.com.

"The beauty of eTapestry is that you always have your data available, if they were to go out of business you can easily contact your second choice ASP and go with them. But I actually knew that the same guys who started eTapestry were the ones who invented FundMaster which I had previously used. I know they wouldn't leave us in the lurch."

Virginia Franco, Life Steps Foundation, Los Angeles.

www.lifestepsfoundation.org. They work with Convio.com.

"Nowadays, one never knows. We did check references and financial info to see that the outfit was solid and our personal interaction with them gave us a sense of security. They are smart and professional and very good with deliverables within scheduled timelines. Besides, we got guarantees as to keeping the information (diskettes) if Convio is no longer in business."



When Not to Work with ASPs

ASPs are not right for all situations. For example, you may want to use a service with features you don't want, but will need to pay for. Here are the main areas of concern:

Project Size, Resources and Communication

Relatively small projects, such as adding a search engine to your Web site or conducting an online survey, will likely not have many requirements. Larger projects, such as donor management, will involve many people in the organization and may necessitate outside expertise and spending more than planned. If these resources are not available, the ASP project may never meet expectations. A lack of support from the board or from management can often make the project much harder. If the reasons behind the project and the goals are not articulated, others don't have the opportunity to offer positive input, and may unintentionally hinder the project.

Your Audience

If the majority of your donors don't use email and you decide to use email to communicate to them, your ASP project won't be successful. Not having the email addresses of the majority of your donors would be another audience-related challenge. Your audience may not be ready for the tools you plan to introduce by working with an ASP, so the product could go unused. It's a good idea to understand how your audience will respond to the ASP and to include this discussion in your organizational needs assessment.

Integrating Multiple Software Needs

What if you integrate your software systems into one very large system, but then find you can't manage it properly? Integrating several different software systems may result in a level of complexity that is difficult to manage. Integrating systems may require changing or eliminating certain jobs, revamping major work processes or re-educating a large number of staff. Although the end result may be more efficient, the process to get there may be more than the time or resources your organization has available right now. It may be less traumatic to make smaller improvements in your current system.

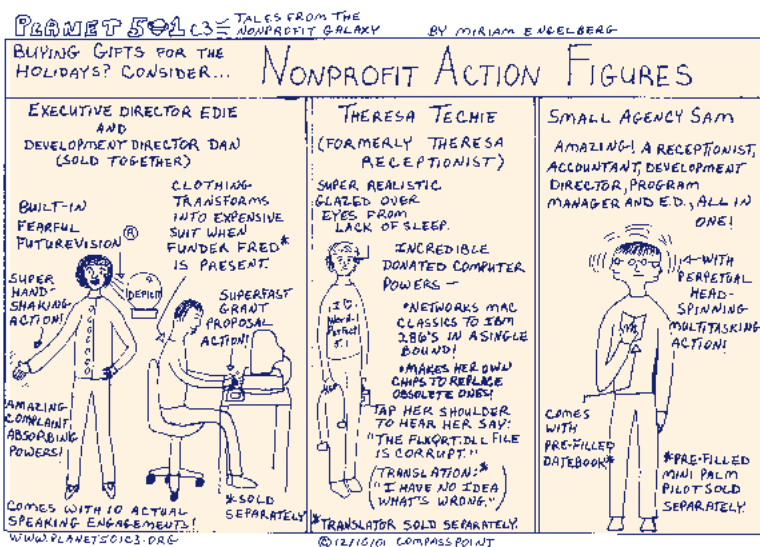
Automating Backups

There are few things as frustrating as having your data be lost or corrupted, and then to find that you cannot restore the data from the backups you have. Having an automatic backup system is only useful when you have staff (or a service) available that knows how to restore the information and can do it quickly. If you only have one person on staff who knows how to restore lost information, you may be stuck when they are on vacation, or if they leave the organization. Frequent turnover or a lack of staff resources can nullify the benefit of having an automated backup that must be restored by your staff. Your ASP may be able to do this for you with minimum staff input, such as a phone call, but if not, be aware of your limitations to affect a restoration of data.

NONPROFIT SOUND BITE

"Try to find someone who is as interested in the success of your online auctions as you are. Play around with other auctions they have done online and make sure they work and are fairly easy to use."

— Carolyn Cole is a Mom at St. Alcuin Montessori School in Dallas.
www.saintalcuin.org



Payments

Paying for software every month, rather than just one time, may be a challenge to some organizations. Although generally a better value overall, long term monthly rental payments may not work for all organizations. If there are cash flow problems that might impact your ability to make your payments, you may lose access to the ASP and, thereby, access to your data. Make sure you can make payments on a regular basis in the long term, or you may end up without access to your data or the features you are renting.

Unexpectedly high usage can create a drain on resources when using pay-by-the-use services. Payment by use can also create issues if you aren't sure how much you will use the software. If you currently use a piece of software 10 hours a week, then \$10 an hour (\$100 per week) may be within your budget. If use goes up to 200 hours per week, either due to an increase in traffic or growth in your organization, you may not be able to pay the \$2,000 per week.

Cross-Platform Use

ASPs that rely on your technology to be up to a certain level may not be the right fit for your organization's technology. Although most ASPs work equally well on PC and Apple computers, not all do. Not only might an ASP require you to use only PCs to access their service, but they may have strict requirements for those PCs. If you have three-year-old computers, the ASP software may require that you buy new computers and upgrade their systems often.

ASP technology that is not at an appropriate level for your staff can greatly reduce its effectiveness. Suppose an employee who must use the software is only familiar with Apple computers or is not comfortable on the Internet. Consider how the technology fits with your staff, in case it doesn't.



Creating Internet Projects Faster

Although ASPs can greatly reduce the amount of time to create a software solution, you may end up with software that's ready to use, but its launch is delayed due to staffing, funding or other issues. You may have to sit on an expensive ASP, without any benefits, until you can use the software. Better to wait, for example, until the money comes through or the person is in place, before purchasing.

Access to Technical Expertise

While ASPs provide access to technical expertise, they can not replace a person in your organization who can accurately describe technical issues. It could be an exercise in frustration to have your development director try to explain to a software programmer what they need the system to do, or exactly what it is not doing. A lack of effective communication results in miscommunications, frustration, wasted time and money. Simple categories of ASP services may require little technical expertise, but many other ASPs require some level of it from you. Without someone to clearly and accurately communicate your technical issues with the ASP, you may find it nearly impossible to get the results you desire. If you do not have access to a staff member or consultant that can speak about technology to your ASP, it may not be the best solution for you. Not all ASPs require a high level of technical knowledge, but even basic requests for changes to a Web site can involve discussions about a myriad of systems that an average nonprofit employee may not be familiar with.

5

Implementation

INSIDE THIS SECTION

- The implementation process
- Knowing who to contact for questions
- Testing, testing, and retesting
- Back up and restoration procedures
- Launching the service internally and externally (if needed)
- Assessing the fiscal impact and value of your solution
- Planning for an ASP business failure

NONPROFIT ADVICE ON SELECTING AN ASP

"Make sure they are working for you and not vice versa. Call, call, call! Make sure they will talk to you over the phone and have a list of questions ready. If possible, have them come out to you and show a demo. If not, have them email you a demo. There can be hidden costs that the ASP may not tell you upfront, such as the credit card companies taking a percentage of each donation as well. Nothing is written in stone...haggle!"

—Elana Mendelson,
Rehabilitation Institute
of Chicago.
www.rehabchicago.org

The Implementation Process

Once you have selected an ASP, plan an implementation process. Give this phase as much care as your selection process. Starting with people in your ASP Selection team, assemble an implementation team. Keep your selection team active, as the implementation team may need information from the selection team during implementation. The implementation team should include a project manager, your technical staff person, and any other staff whose programs are connected to the ASP solution.

Someone will have to monitor your use of the ASP and manage your relationship with the company. Time must be allotted to make sure the service is meeting your needs and operating as promised, to deal with any issues that arise, and to measure its success at meeting organizational needs.

In some organizations, the person responsible may be the technical staff person, the office manager, an administrative support person, or even the Director of Development or Director of Operations. The best fit comes when an employee is interested in technology and understands how this service fits the organization's needs.

Find out where this "ASP Project Coordinator" will go for help. Do they have to call the general customer service number, or will they have a dedicated representative? Is information available to customers on the Internet or only via email and phone? Are there customer numbers, serial numbers, or other information this person will need to access when asking for help? Who will perform these tasks if the designated person is not available?

Determine internal responsibilities as well. Who will make decisions about changes to the system or about your work processes? How will users communicate with management about issues with the system?

Test Your New Software System

Take the product through as many scenarios as possible before implementing it. Test all the major functions several times; test all functions at least once. Examine the results of your tests to see if they show a vulnerability or produce unwanted or even welcome results other than what you'd expected. Try doing crazy things with the service to see how it responds - see if you can break it (be sure to do this on a test copy, not with the active system). When possible, have others both internally and externally test it and discuss their results. They may have insights that will improve how you use the service, items to include in training, or even changes to other systems that could be beneficial.

Prepare Your Backup System

Just as you test the software, test the backup systems supporting your ASP selection. Make a plan for what your agency, independent of the ASP, will do to assure the safety of your data. Whenever possible, get physical copies of your backups and secure them in your office and outside your office. If there is a procedure to go through with your ASP for backups to occur or for restoration of lost data, be sure you have the documentation and that more than one person is well versed in the necessary procedures. Review (and create if necessary) a system to back up that data and to have a record of what was delivered, when and how.

Create a Plan for “Going Live”

Plan how the system will be made active once testing is complete. If it is an addition to your public Web site, for example, you may want to have a promotion or press release with information on how your Web site is improved or has new functionality. If it is an internal system that contains your donor data, a plan is needed to know when data will be taken out of your old system, how (if needed) the data will be reformatted or rearranged, when a sample set of the data will go into the system for testing, and when the final version will be brought up and the old system will go away. Depending on the service, you may want to have different plans for how it will be launched internally and externally - maybe it is launched internally first, to help work out bugs, then two weeks later it is launched to the public. If it is a big improvement on how you do business, you may want to invite your Board or donors to an event to herald the launch. Take the opportunity to market yourself.

Review Your Selection and Technology Options Regularly

Review the operational effectiveness of the ASP you are working with by calling a meeting of your ASP team. See if the desired outcomes were reached. If not, see if plans can be made to move toward them. If so, be sure to celebrate your success! Keep up to date with what other software exists (or ceases to exist) that is similar to the service you have selected. If your needs change, or are not being met by your ASP, it will be helpful to know what your options are. Explore and make any needed changes to your existing systems as your ASP system becomes integrated into your agency's operations.

Evaluate the Use of Your Internet Connection

As the use of your new ASP tools becomes integrated into your agency's operations, be sure to review how your Internet bandwidth and network needs may change as a result. Internet use will normally increase as a result of using the ASP, so monitor this change and adapt as needed. You may need to purchase additional bandwidth or upgrade your network to meet the increased needs of your staff.

Have a Plan for Training and Keeping the Knowledge in the Organization

Using an ASP usually increases the need for specialized knowledge in the organization. Usually, a point person will be designated to be the “ASP Coordinator.” Have a plan to train a backup to that person, and to support that person's knowledge and skills. It can be challenging to be dependent on one person, so be proactive. Try to disperse the knowledge in the organization.

Document, document, document. Have an operations manual that details step by step how your organization uses the system. Often this is the only way to pass on the information of how to use the product when turnover occurs. This is also useful when others are examining your systems, looking for ways to improve efficiency. Documentation gives the knowledge about your system a place to live other than in an employee's head.

NONPROFIT ADVICE ON SELECTING AN ASP

“This is going to be a long-term, almost familial relationship. Make sure you meet the staff that will be assigned to you and that you are comfortable with them. Also make sure that you sign a contract that gives you as much certainty as possible over final costs. Many of the companies that we spoke with declined to give us hard estimates before signing a contract. Virtual Sprockets worked with us to come up with contract language that met the cost concerns of the ACLU.”

— Phil Gutis, ACLU Washington National Office. www.aclu.org. They work with VirtualSprockets.com to manage their Web site

Hope for the Best — Plan for the Worst

If your ASP goes out of business, it's important that you have protected yourself against any damage the shutdown might cause you. The best protection is to have this possibility addressed in your contract with the ASP. The contract should state specifically what will happen to your data should the organization cease to exist or is bought by another company. You can agree to a system where every other week a copy of your data is sent to someone in your office, so you always have a copy of it. The ASP can be responsible for holding your data until you find a new place for it. This is important if the ASP will hold information that is vital to your everyday operations, so make sure the contract addresses exactly what will happen should the ASP shut down. Include items such as how much notice the ASP will give you, in what format they will deliver your data and any procedure required of your agency to get the data.

If you keep confidential information on an ASP, it is also smart to detail in the contract what liability the ASP is willing to accept if your information is compromised. ASPs that have a high level of confidence in their security may be willing to accept a certain level of liability should there be unauthorized access to your data. Other ASPs may be unable to accept liability, so it will be your decision as to the seriousness of your information being stolen or made available to the public.

We recommend that you always have a physical copy of your data that is up-to-date as protection against unforeseen disasters.

WHAT ASPs TOLD US

"More often than not, I'm contacted by an organization that 'urgently needs' our product because their president, board member, or manager has decided that online discussion is THE KEY to solving their communications issues. It's the old 'build it and they will come' scenario."

— Anonymous
ASP Manager

NONPROFIT ADVICE ON SELECTING AN ASP

"Go into it with your requirements already defined. Don't let the sales people define what your organization needs because they'll try to sell you all sorts of things and since technology isn't what your organization is really about, don't buy something that you haven't already established you need."

— Michael Langford,
CARE USA, Atlanta.
www.care.org.
They work with
SocialEcology.com.

Further Resources

- Additional resources to help you research and select ASPs
- Ways to stay informed about nonprofit Internet technology



Web Sites, Listservs and e-Newsletters

The Nonprofit Matrix (www.nonprofitmatrix.com) is a Web portal that focuses exclusively on ASPs that serve nonprofits. You'll find it useful because it provides an up-to-date and exhaustive listing of ASPs divided by the different tools they offer. User reviews provide anecdotal information (mostly positive) about specific services. Their News section is a good way to find out about recent product developments. Finally, their Tombstones list is a way to find out about services that have closed. We recommend that you subscribe to their free e-newsletter with news items and listing updates on a bi-monthly basis.

TechSoup (www.techsoup.org) is a Web portal about the whole non-profit technology field. A quick way to find ASP resources on TechSoup is to type "ASP" into the search engine window on the home page. Another way is to click on "Resource Lists" under the left Tools menu and select the "Application Service Providers" item, which provides an annotated listing of services. Several of the Community Center Message Boards regularly have discussion threads relating to ASPs. If you have a burning question about ASPs, these are active Message Boards where you can expect quick replies and receive email notification when someone has replied. Michael Stein has a Guide to online fundraising at this site. Be sure to subscribe to By The Cup, TechSoup's excellent monthly e-newsletter.

e-Philanthropy v2.001: From Entrepreneurial Adventure to an Online Community (www.actknowledgeworks.net/ephil) is a written report about online uses by nonprofits written in 2001 and looks at the current state of e-philanthropy. There is also an online database of ASPs (not updated) with a very useful search interface.

Dot Org (www.dotorgmedia.org) is a free monthly e-newsletter published by nonprofit Internet consultants Michael Stein and Marc Osten that gives practical advice to help nonprofits make the most of the Internet. They've covered topics such as email newsletters and creating successful online events, and often include reviews of ASPs.

Nonprofit Internet Resources (www.rickchrist.com) is a Web site maintained by nonprofit Internet consultant Rick Christ. Among this collection of his 200 articles on Internet marketing and e-fundraising is a wealth of information about ASPs. Use the search window to type in "application service provider" or enter the name of an ASP that you're researching. Rick also publishes a free bi-monthly e-newsletter which delivers his new material to your email box.

Consultants ONTAP (www.ontap.org) is a Web site that lists hundreds of consultants (mostly in Northern California) that work with nonprofits, including technology consultants that can assist with researching and selecting ASPs. To find a technology consultant on this Web site, select "Find a consultant by area of expertise" on the home page, and then scroll down to "Information Systems."

Online Fundraising Mailing List (www.gilbert.org/fundraising) is a free discussion listserv hosted by Michael Gilbert of The Gilbert Center in Seattle. This discussion list is focused on online fundraising topics, and ASPs are a frequent topic of discussion. Nonprofit staff frequently post comments about what they are learning. To subscribe, email to autoshare@gilbert.org with "sub fundraising" in the body.

Donor Digital Direct (www.donordigital.com) is a free e-newsletter published by Internet consulting firm Donor Digital that offers news about online fundraising, marketing, and advocacy. The newsletter often includes news and case studies about ASPs. The Donor Digital Web site also offers resources about ASPs as part of their articles on "Moving direct mail donors online," "Choosing an e-vendor," and "Using email services."

Convio Monthly (www.convio.com) is a free e-newsletter published by Convio, one of the leading ASPs serving the nonprofit sector. This e-newsletter offers unusually high quality content to help nonprofits use the Internet effectively. Naturally, it also includes information about Convio's ASP services.

Nonprofit Online News (<http://news.gilbert.org>) is a free weekly news bulletin about developments in the nonprofit sector with a slant toward technology. Edited by Michael Gilbert, it provides an invaluable source of information, reading, and useful links. Subscribe to the free e-newsletter and get the news delivered Sunday evenings to your email box.

Nonprofit Technology Consulting, Training, and Support Resources

BELOW ARE SOME RESOURCES THAT WE SUGGEST. IN ADDITION, THE FOLLOWING TWO WEB SITES PROVIDE LINKS TO HUNDREDS OF TECHNOLOGY ASSISTANCE PROVIDERS, WEB DEVELOPERS, AND MORE:

TechSoup.org Resource Lists (www.techsoup.org) On the home page, along the left navigational toolbar, click on "Resource Lists" (www.it'sunderthetoolbar.org). You'll find a number of useful lists here, including Technology Assistance Providers, Training Centers, Web Developers, Nonprofit Technology Listservs, and E-Newsletters.

Community Technology Center's Network (www.ctcnet.org) This national, nonprofit membership organization lists more than 500 independent community technology centers where people get free or low-cost access to computers and computer-related technology, such as the Internet, together with learning opportunities that encourage exploration and discovery.

NATIONAL

The Alliance for Nonprofit Management (www.allianceonline.org) is the professional association of individuals and organizations devoted to improving the management and governance capacity of nonprofits. Some, not all, offer technology-related services. There is a provider search at their Web site where you can look for support organizations in your area.

Nonprofit Resource Center (www.nonprofitresourcectr.org) located in Sacramento, provides resources, leadership development, workshops, training, and consulting services, to Sacramento and 18 surrounding counties.

Sierra Nonprofit Support Center (www.sierransc.org) provides consulting, workshops, training, and other services for nonprofits. The center serves the California counties of Tuolumne, Calaveras, Amador, Mariposa, Stanislaus, and San Joaquin in the foothills of the Sierra Nevada.

The Management Center (www.tmcenter.org) is a leading resource for nonprofit management support in Northern California and has been around since 1977. They offer several annual conferences and regular seminars that cover strategic technology topics, as well as consulting services in the areas of organizational development and human resources. Visit their Web site or call 415.362.9735 to learn more about them.

NORTHERN CALIFORNIA

Center for Excellence in Nonprofits (www.cen.org), located in San José, provides the nonprofit community with leadership development and continuous improvement programs through an innovative learning community model. CEN also sponsors Wired for Good, a project helping nonprofits with technology planning.

Community Resource Connection (www.ncoinc.org) is a grant research library and nonprofit assistance program serving Lake and Mendocino Counties in Northern California. Located in Ukiah, they provide publications, workshops, training, and consulting, among other services.

CompassPoint Nonprofit Services (www.compasspoint.org) is a leading nonprofit consulting and training organization with offices in San Francisco and San José. They offer hundreds of workshops and several Bay Area conferences that cover technology topics. Their technology consulting services and Technology Conference can help nonprofits select or work with ASPs. Visit their Web site to learn more about them, or call John Whitmer at 408.248.9505 or Tom Battin at 415.541.9000 to inquire about technology consulting or classes.

CompuMentor (www.compumentor.org) is a national organization headquartered in the San Francisco Bay Area providing technology resources to schools and nonprofits serving low-income communities. Their Mentor Matching service, which provides a volunteer for a specific project, can be helpful to nonprofits that are seeking help in selecting or working with ASPs.

East Bay Resource Center for Nonprofit Support (www.infobase.org) serves Alameda and Contra Costa Counties. Their mission is to promote the growth and stability of local nonprofits by providing access to funding resources and information, technical assistance, support services, and knowledge of effective resource development and business management.

SOUTHERN CALIFORNIA

Center for Nonprofit Management (www.cnmsocal.org) in Los Angeles, helps nonprofit organizations more effectively fulfill their missions by providing the highest quality professional management information, education, training, consulting, and sector labor market analysis services.

Nonprofit Management Solutions (www.npsolutions.org) is the major provider of management training, consulting, and information resources to nonprofit organizations in San Diego County, with outreach to clients in Riverside, San Bernardino, and Imperial Counties. Their programs and services are designed to assist nonprofit professionals and volunteers in building skills and organizational capacity to better serve their communities.

Nonprofit Support Center of Santa Barbara County (www.nscsb.org) is a regional training, consulting, and resource center for board members, staff, and volunteers of nonprofit organizations. Their mission is to support and strengthen the governance, leadership and management of nonprofit organizations throughout the region in their efforts to serve their communities.

Community Technology Center's Network (www.ctcnet.org) This national nonprofit membership organization lists more than 500 independent community technology centers where people get free or low-cost access to computers and computer-related technology, such as the Internet, together with learning opportunities that encourage exploration and discovery.

Books, Publications and Articles

The Nonprofit Organization's Guide to E-Commerce

by Gary Grobman is a well-assembled book that covers the wide range of issues relating to e-commerce, including a thorough discussion of ASPs. Published September 2000, by White Hat Communications at 717.238.3787 or www.socialworker.com/nonprofit/nphome.htm. \$19.95 plus shipping.

The Charleston Principles: On Charitable Solicitations Using the Internet, presents the informal, non-binding advice of the National Association of State Charity Officials Board of Directors to its members. These principles are worth considering before working with ASPs on an online fundraising project. The Charleston Principles were developed from over a yearlong process of careful study, analysis, and discussion among state charity officials. More info at www.nasconet.org/stories/storyReader. Cost: \$10.

e-Philanthropy v2.001: From Entrepreneurial Adventure to an Online Community (www.actknowledgeworks.net/ephil) is a report and online database of online services and ASPs written in April 2001 by W.K. Kellogg, Stephanie Clohesy, and Program Director, Tom Reis, that looks at the current state of e-philanthropy. The database offers a very useful search interface to find ASPs by type of service.

Fundraising on the Internet, Second Edition (The ePhilanthropy Foundation Guide to Success Online) is the revised edition of this book originally published in 1997. This book is an excellent primer on e-philanthropy, a comprehensive overview of the many potential uses of email and the Internet in advancing the financial development of nonprofit organizations, and includes much discussion of ASPs. Published by Jossey-Bass.

"Making Use of the Internet — Issues for Tax-Exempt Organizations,"

by Alice M. Anderson and Robert A. Wexler of the San Francisco law firm Silk, Adler & Colvin. The characteristics of the Internet combined with the specific rules governing exempt organizations give rise to unique issues not previously faced. Policies should be adopted and enforced so that inadvertent linking to other sites or dissemination of protected information does not put an entity's exempt status at risk. An article worth reading before working with ASPs on online fundraising. Originally published in May 2000 in *The Journal of Taxation*. Available on TechSoup, search for "wexler."

"High-Tech Hopes Meet Reality," is just one story in an excellent issue of the *Chronicle of Philanthropy*, dated June 14, 2001, which includes an excellent discussion of ASPs. Available at www.philanthropy.com.

"Application Service Providers: The Next Horizon in Software,"

by Marc Osten and Michael Stein, in *The Nonprofit Quarterly*, August 2000. A general overview article on ASPs that looks at issues such as value, challenges, and selection criteria. Available at www.dotorgmedia.org.

Glossary

10baseT/100baseT: (see Ethernet)

Access: A Microsoft relational database software program that runs in the Microsoft Windows operating system, and that is used to store data. The software can be customized in myriad different ways to present data and create reports about the data.

Apple: Used to refer to computers made by Apple Computer, also referred to as Macs, for the name Macintosh. Types of Apple computers include G3s, G4s, and iMacs, among others.

Applet: A small software program, often designed to work with larger software programs. (see also Application)

AppleTalk: Refers to the network protocol or “language” used by Apple computers. AppleTalk is specific to Apple computers. Some Apple computer networks can also use TCP/IP (see also), another protocol that is used on IBM-type networks and on the Internet.

Application: The term used to refer to software programs, i.e., Microsoft Word and Netscape Navigator are both applications, though they do different things. (see also Applet)

Application Service Provider: A company that delivers software over the Internet to a computer, usually for a monthly fee. Also referred to as ASPs.

ASP(s): see Application Service Provider

Attachment: A file that is “attached” to an email message. This can be a document, a spreadsheet, a movie, sound, or other information.

Backup: The process of backing up information on a computer. The term is also used for the file created from such a process, as in “moving the backup onto another computer.” The process is undertaken to preserve information in case of a computer problem. Backups can be performed to computer hard drives, disks, or tapes. Many ASPs that store information offer a backup service to help preserve data stored on their systems.

BPS (Bytes or “bits” per second): The unit of measure for data that is sent over phone or other lines. Also used to refer to the speed of a modem, measured in “kilobytes” per second or KBPS. For example a 56K modem means it handles 56 kilobytes of information per second. ISDN, DSL, and fiber optic connections provide much higher speeds than regular phone lines, which impacts the speed at which your ASP service may work.

Broadband: Refers to a type of information delivery system that can send more than one type of data signal—for example, voice and data—allowing the Internet connection to run much faster. DSL and cable are the most familiar types of broadband, though there are others.

Bulletin Board: Bulletin boards are online places where people can leave messages, read others’ messages, download or upload files, all on a specific topic. Different from “chat rooms” (see also), bulletin boards do not allow for real time interaction, but do provide a place to find or share information online. Also referred to as discussion boards.

Cable modem: Like DSL, cable modems provide higher speed access to the Internet. They are not available everywhere.

CCM: see Client/Contact Management

Chat: Refers to communication over the Internet, usually in real time. Users can “chat” with each other in a service akin to a combination of email and telephone communication, where you are typing your words, but your message appears on the other computer almost immediately, a response can be sent and so on. Also can be used with groups to hold online discussions, usually in a chat room (see also).

Chat Room: A place on the Internet where people go to read discussions or participate in a discussion. These rooms are usually organized by subject or interest area. Private chat rooms also exist to allow discussions with only a select person or people.

Client: In a networked environment, refers to a computer that uses another computer, called a Server (see also) to run a software program. Most of the software program lives on the Server, and the Client uses a program that accesses the software over a network, rather than have all of the software program living on the client machine. This allows large amounts of data to stay on the server, rather than having to be moved to each machine, or having multiple copies of the same data on all machines in a network.

Client/Contact Management: Refers to database software used to store information on clients, such as in social service agencies.

Cold Fusion: This Allaire Corporation’s database application software is used to give databases a World Wide Web interface, allowing information from a database to be accessed and updated using a web browser. Examples of its application include order entry, event regis-

tration, catalogue searches, and calendars, among others.

Compression: Files are compressed to take up less space. Files are compressed to make it easier to send them by email, to allow them to fit on a disk, or to save room when doing a backup, among other uses. Compression programs use algorithms to save all of a file’s information in less space than it would normally occupy.

Cookie: When you visit some Web sites, the company can put information onto your hard drive. The file may contain your username, passwords, or information on your preferences. Cookies allow web sites to recognize a registered user when that user returns to the site. They can hold information about purchasing preferences so a Web site can show you products you might be interested in.

CRM: see Customer Relationship Management

Cross-platform: Describes software or hardware that works on more than one system (Microsoft Windows, Macintosh Operating System, Unix, etc.). Many ASPs are cross-platform, working essentially the same on either IBM-type or Apple computers.

Customer Relationship Management (CRM): Refers to software that can manage a variety of information on customers, including purchasing and billing information. Some CRM software can also be used to track internal inventory, accounting, and sales information. (see also Donor Relationship Management)

Data import/export: The process by which information is taken out of (exported) or put into (imported) a database or other software program.

Data encryption: see Encryption

Database server: see Server

Database software: Software that can be used to store and present information. Some database software comes already set up to accept and present some data, but often needs further changing to meet the needs of its users. Databases are a tool and on their own will not replace or create a sound process for handling information.

Dial-Up: Describes an account, connection, or service used to connect to the Internet, a network or other software, usually using a modem over a phone line. Dial-up accounts usually require a username and password to grant access to the service or computer, and are known for being slow connections.

Digital Subscriber Line (DSL): Describes a type of information delivery line that can handle larger amounts of information than a regular phone line, increasing the speed with which people connect with the Internet. Also known as a “high-bandwidth” connection, DSL comes in different speeds, with higher speeds costing more. Once DSL is installed, the speed can often be increased for additional monthly charges, up to its limit. Speeds of home DSL lines are often limited by the service provider, and often provide different speeds for sending and receiving files.

Discussion Board: see Bulletin Board

Donor Management: see Donor Relationship Management

Donor Relationship Management (DRM): Similar to Customer Relationship Management (see also), refers to software that can track donor information, sometimes including donation history, event attendance, other affiliations, and personal information. These systems can usually provide more sophisticated reports on data than more basic databases that only contain names and addresses. Also referred to as donor management software.

Domain name: The unique name that identifies a Web site, like www.amazon.com or www.compasspoint.org. Domain names always have two or more pieces, separated by periods or “dots.” Because many businesses use the extension .com (dot com), this led to using the term dot com for a business on the Internet and dot org to describe a nonprofit organization online. [Note that these extensions (.com, .org, etc.) are only guidelines, and for-profit companies, like craigslist.org, are not necessarily nonprofit organizations, but use the dot org suffix in their domain name.]

Dot Com: see Domain name

Dot Org: see Domain name

Download: Moving a file or program from another computer onto your computer via the Internet. You can download files or programs over a network, but it usually refers to getting a file from the Internet. The reverse action, moving a file onto the Internet (or another computer), is called an Upload.

DRM: see Donor Relationship Management

DSL: see Digital Subscriber Line

E-commerce: Shorthand for Electronic commerce, meaning a purchase or sale made electronically, usually over the Internet.

Also refers to software programs that allow sales to be made and money collected on the Internet, as in e-commerce application.

Email: Short for Electronic mail, messages that are sent via the Internet, to one or multiple addresses. Files can be sent along with the messages (see Attachments).

Encryption: A process of “coding” or scrambling information to make it difficult for others to access the information. A code or specific software is needed to access the information.

Ethernet: The most common form of networking computers, using special cards, wires, and boxes (called routers or switches) to connect computers. Types of cables (and the networks they make up) include those called 10baseT and 100baseT (100baseT is 10 times faster than 10baseT and is sometimes called Fast Ethernet). Both IBM-type and Apple computers can use this technology to create networks. Ethernet addresses are six part numbers that identify a specific network card on a specific computer, used when setting up a network.

Ethernet address: see Ethernet

Eudora: A software program to send and receive email.

File Transfer Protocol (FTP): A method of transferring files from one computer to another, commonly used to transfer files to an Internet server that hosts a Web site. FTP can be used to send or retrieve files. Files (like software programs) are often downloaded using FTP sites, i.e., <ftp://sitename.com>.

Firewall: A software program, piece of hardware, or combination, designed to prevent access to networks or computers, especially access from the Internet. Firewalls protect computers and networks from intrusion by uninvited persons.

FSP: see Full Service Provider

FTP: see File Transfer Protocol

Full Service Provider (FSP): This term has two meanings. One describes a company that provides almost all Information Technology (see also) services, including computers, peripherals (see also), networks, software, Internet access, and backups, among others. Full Service Provider can also refer to an ASP that not only delivers software over the Internet, but also creates and modifies the software themselves.

HTML: The language used to create pages of information on the World Wide Web, containing text, graphics, audio, or video. (Short for HyperText Markup Language.)

HTTP: The protocol used by the Internet, hence the often seen prefix to Web addresses, i.e., <http://www.sitename.org>. (Short for Hyper Text Transfer Protocol.) (see also File Transfer Protocol).

Hyperlink: see Link

HyperText Markup Language (HTML): see HTML

Hypertext Transfer Protocol (HTTP): see HTTP

Information Technology (IT, I.T.): A term that encompasses all forms of technology used to create, store, exchange, and use information in its various forms. Includes computers, printers, networks, and the human systems set up to use those tools.

Internet: The interconnected collection of computers and networks around the world that use a similar language to communicate. Among other things, the Internet includes the World Wide Web (see also), FTP (see also) sites, and email (see also).

Internet Explorer: Microsoft’s Web browser software program.

Internet Service Provider (ISP): The company that provides you with the service that allows access to the Internet. This is often different from the company that provides the phone or other line that physically connects you with your ISP. For example, AOL is an Internet Service Provider, but they don’t install phone, DSL, or other communication lines.

Intranet: A type of internal Internet for use within one organization or company to share and store information. Unlike the Internet, intranets are private networks.

IP address: The numeric code that is the unique identifier for a particular computer connected to the Internet. Each computer on the Internet has its own IP address, usually in the form of three, then two, then two, then two more numbers, each set separated by a period, i.e., 123.12.23.43, though there are other formats.

ISP: see Internet Service Provider

IT or I.T.: see Information Technology

KBPS/KPS: see BPS

LAN: see Local Area Network

License: see Software License

Link: A word or picture on a Web page that, when clicked on, takes the user to another place on the same page, to a different page or even a different Web site.

Listserv: A program that sends email to a list of email addresses. Users submit their email address so they receive emails on a specific topic. Requests to subscribe or unsubscribe from a list are sent to a special address so all members don't see that email. Organizations can also submit lists of email addresses to a listserv so, for instance, all of an organization's donors receive an update.

Local Area Network (LAN): A networked group of computers, usually contained in one office or one building. These networks allow information sharing between the computers and allow them to access Servers (see also), the Internet, and other resources. (see also WAN)

Macintosh: The name used for Apple Computer Company computers, often referred to as "Macs." These computers use the Macintosh Operating System (Mac OS). A generic term used to refer to all Apple computers.

Mailing List: A list of email addresses used to send messages to groups of people. (see Listserv)

Microsoft Internet Explorer (MSIE): see Internet Explorer

Microsoft Windows/Windows: An operating system software. Microsoft Windows comes pre-installed on the majority of IBM-type computers. Microsoft Windows is required to run other software such as an Internet browser, Microsoft Word, Excel or PowerPoint, etc. Versions include Windows 95, Windows 98, Windows NT, Windows Me, Windows 2000, and the newest version, Windows XP.

MS: An abbreviation for Microsoft, as in MS Word for Microsoft Word.

Netscape Navigator (or Communicator): Netscape Communication Corporation's Internet browser software program. The Communicator version offers additional tools such as email.

Network: Two or more computers connected to share information and/or resources.

Newsgroups: An Internet based discussion group made up of collections of related messages or "postings" on a specific topic.

Online: Refers to anything provided or used with regard to the Internet. Using software online means it is used over the Internet. "Going online" means connecting to the Internet.

Operating System (OS): The software that manages a computer's functions and that is necessary to run applications. For example, Microsoft Windows is the operating system on IBM-type computers necessary to run the word processing program Microsoft Word. On Apple computers, Mac OS is the operating system necessary to run applications such as Netscape Navigator. There are many other operating systems, but these are the most common for desktop computers in nonprofits.

OS: see Operating system

Outlook: An email program made by Microsoft

Outsourcing: Hiring an external company or service to do work that used to be done by staff. For example, you can build a database or outsource the building of the database. Using an ASP database through the Internet is another way to outsource.

Peripherals: Pieces of hardware that connect to a computer, such as monitors, printers, scanners, modems, and external drives.

Protocol: A protocol is the set of rules that computers use to communicate, sometimes called a network protocol or communications protocol. These rules let computers work together by using the same protocol.

Server: In a networked environment, a computer that stores software, files, or both. Other computers on the network, called Clients (see also) use software to access a program on the server, instead of all of the software living on the client machine. Server can also refer to a machine that runs a software program or programs for specific functions, i.e., an email server that collects and distributes email, or a database server, where a database lives, but where the client machines can access the software and data. The server stores most of the information, so the information does not have to be moved across the network each time the program is run.

Software License: Permission from the company selling software for its use by the buyer, usually restricted to use on one computer. Additional licenses can be purchased separately from software to allow an organization or a person who already owns the software to install it on more than one computer. Licenses typically restrict or forbid modification and distribution, among other terms of use.

T1 line: A T1 (pronounced Tee-One) line is a very high-speed bandwidth connection for transmitting voice or data information.

TCP/IP: A language or protocol used to network computers and also used as the foundation of the Internet.

Upload: Moving a file or program from one computer to another computer, usually over the Internet. (see Download)

URL: The string of characters that make up a Web address (stands for Uniform or Universal Resource Locator). For example, the URL for CompassPoint is compasspoint.org.

WAN: see Wide Area Network

Wide Area Network (WAN): When two or more Local Area Networks (see also) are connected, usually by high-speed connections, they form a Wide Area Network. WANs can include computers spread throughout a city, a country, or the entire world.

windows: Not to be confused with Microsoft Windows, the term "window" refers to a box on a computer screen that contains information. A window can show a document, a spreadsheet, or an error message, among many things. Example: "Click on the Microsoft Word window, copy the information you need, then click on the Internet browser window and paste the information into it. If an error message window appears in Microsoft Windows, report what it says to your technical support person."

World Wide Web (WWW): The entire collection of Web pages and HTML (see also) files available over the Internet.

WWW: see World Wide Web

Zzzzzzz: The sound of sleeping brought on by reading too many Web pages in a row.

About Us

Community Technology Foundation of California

The Community Technology Foundation of California is an unprecedented grantmaking institution dedicated to collaborative efforts towards bridging the “digital divide” in California’s low-income, minority, limited-English speaking, small business, senior, immigrant, and disability communities. Founded in 1998 through a partnership of 134 community organizations and Pacific Bell (now part of SBC Communications), CTF of CA is an independent community foundation and works to meet the needs of California’s underserved communities for full and equal access to basic and advanced telecommunications services, and their needs for knowledge carried by these services. As of May 2001, CTF of CA has awarded \$8.1 million in grants for community technology efforts in underserved communities all across California. Grant guidelines and additional information from the Foundation are available at www.zerodivide.org.

CompassPoint Nonprofit Services

With offices in San Francisco and Silicon Valley, CompassPoint Nonprofit Services is one of the nation’s leading consulting and training firms serving nonprofit organizations. Through its 41 staff and hundreds of volunteer professionals, CompassPoint provides consulting, training, and research to nonprofits in fundraising, technology utilization, strategic planning, nonprofit finance, executive transitions, boards of directors, strategic internet presence, and other topics. Last year CompassPoint conducted 700 workshops for Bay Area nonprofits and consulted to more than 300 nonprofit organizations nationwide. In addition to workshops and consulting, CompassPoint publishes three free electronic newsletters – *Food for Thought*, *Silicon Valley Food for Thought* and the *Board Café*. CompassPoint’s mission is to increase the effectiveness and impact of people working and volunteering in the nonprofit sector. More information at www.compasspoint.org.

Michael Stein

Michael Stein is a nationally known author, analyst and technology consultant with a decade of experience with nonprofits, foundations, labor unions, and socially responsible businesses. He co-authored two books about the Internet including, “Fundraising on the Internet: Recruiting and Renewing Donors Online,” with Nick Allen and Mal Warwick (new edition published November 2001). In his consulting practice, Michael produces workshops and Web content, and advises organizations on Internet strategy, online marketing, and technology solutions. Recent clients include TechSoup.org, Association of Small Foundations, Packard Foundation, EdSource, Carnegie Corporation of New York, Benton Foundation, and Children Now. Michael runs Dot Org Media with Marc Osten, a publishing and syndication service that offers an e-newsletter, Web content, and special reports on nonprofit technology. In addition, Michael is a Guide on Online Fundraising for TechSoup.org and serves on a number of nonprofit technology Advisory Boards. His opinion and analyses have been featured in The New York Times, The Chronicle of Philanthropy, The Industry Standard, The Nonprofit Quarterly, National Public Radio, and Wired News. He is a frequent speaker at nonprofit management conferences. He can be reached at www.michaelstein.net.

John Kenyon

John Kenyon is a nationally known speaker and technology strategist for nonprofits. He has over fifteen years of experience helping nonprofits with technology. John helps nonprofits assess their technology needs and provides design, implementation, and strategy solutions. He is currently the Information Technology Director for The Management Center, where he created a nonprofit computer consulting group. He coordinates with other technical service providers around the country and helped form a collaboration between TMC and CompuMentor to provide technical support to nonprofits. John works with executive directors, board members, and technology staff to help plan (and budget) for technology. He writes articles and presents seminars on planning, budgeting, staffing, and funding for technology, as well as on ASPs. John has consulted for a variety of organizations, including: The Volunteer Center of San Francisco, The Yosemite Fund, Girls, Inc., Point Reyes National Seashore Association, Huckleberry Youth Programs, and Meals on Wheels of San Francisco. He can be reached at www.johnkenyon.org.

How to find this Guide online or to order hard copies

This Guide is available for free download at www.compasspoint.org/enonprofit.

To purchase a hard copy of the Guide for \$16.00, plus tax and shipping, visit www.compasspoint.org or contact:

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Other publications available through CompassPoint

A First Map: Exploring the market for consulting services to nonprofit organizations in the San Francisco Bay Area
Michael Allison, M.B.A. et. al.

A House Divided: How Nonprofits Experience Union Drives
Jan Masaoka, Jeanne Peters and Steve Richardson

Daring to Lead: Nonprofit Executive Directors and Their Work Experience
Jeanne Peters M.N.A., Tim Wolfred Psy.D. et. al.

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Cristina Chan, M.P.P and Sonali Rammohan, C.P.A.

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Jeanne Peters et. al.

Into the Fire: Boards and Executive Transitions
Michael Allison

Nonprofits at Risk: The Space and Occupancy Crisis Facing San Francisco's Nonprofit Community
Jeanne Peters et. al.



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