



Technology Affinity Group
Promoting technology in philanthropy

Avoiding and Solving Problems Selecting and Implementing Integrated Philanthropic Information Systems



Martin Schneiderman
Information Age Associates
47 Murray Place
Princeton, NJ 08540 USA
mbs@iaa.com
www.iaa.com
Office 609-924-6936
Mobile 609-203-1137

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To Dream the Impossible Dream

- A seamlessly integrated grants management system with links to other online services and in-house applications
- Has a great modern user interface
- Is powerful and easy for *everyone* to use
- Great support from the service provider



What are your **greatest needs** about **integrated foundation information system** service providers and their hosted systems?



25 Major North American Integrated Foundation Information System Grants Management Service Providers



Names of acquired companies are underneath the larger logos

Grantmaker Feedback



- *Seamlessly integrated* grantmaking systems
- Improved service
- A better user interface *for everyone*
- More needed features
- Better backend efficiency
- Reliable systems
- High level of security
- Better searching
- Improved reporting
- Mobile accessibility
- Better 501(c)(3) validation
- Grant outcome tracking and reporting
- Global reach for your staff and nonprofits worldwide
- Multi-currency
- Links to external services and our accounts payable
- Responsiveness/timing of disaster relief sites
- Shorter lapse time to donate funds

Some Major Reported Challenges with Grantmaking Systems

- Not meeting all of our expressed needs
- Problems with services and inexperienced provider staff
- Insufficient configurations, and personalizations
- The UI is too complicated
- Poor web browser compatibility
- Integration with other systems
- Searching and reporting our data
- Need for outcome tracking
- We're seeking lower costs



More than Migrating Data *

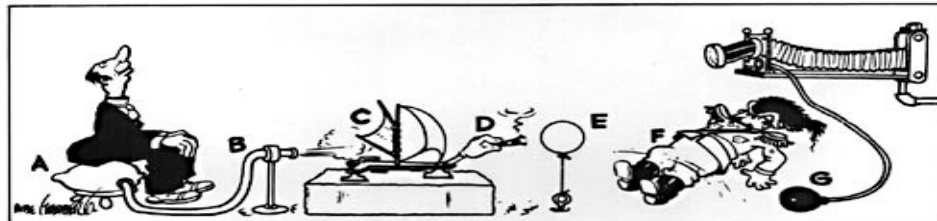


- In addition to migrating all data and attached files, who will also migrate, configure, or reconfigure all:

- User access rights
- Hierarchical code tables
- Write-up templates
- Correspondence templates
- Online application forms
- Online review forms
- Online grantee reports
- Saved searches and favorites
- Workflows
- System and ad hoc reports and favorites
- Budgets
- Graphical dashboards for each team and/or user
- Links to all external systems



What are the **greatest problems** you encounter selecting and running your core systems locally and from the cloud?



Picture-Snapping Machine RUBE GOLDBERG (tm) RG1 074

Key Factors in Vendors Managing Acquisitions and Partnerships

- Underestimating their challenges merging very different organizations
- Managing different business models and leadership styles
- Scaling up to hire, train, and manage more staff plus effectively support more clients
- Figuring how to realistically link and integrate entirely different technologies



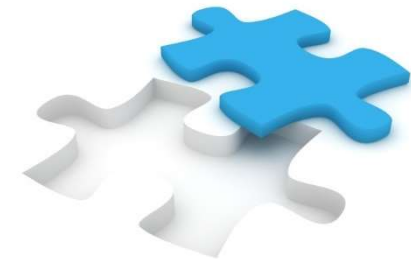


Case Study

Selecting a New System



- How do we go about specifying our prioritized new system requirements to select our best-fit integrated system?
 - How do we determine our key requirements?
 - Which is better, a customized system or a commercial system that enables extensive personalized configurations?
 - Should we be concerned about having all our core system software and data off site in a vendor hosted commercial data center?



Selecting a New System

The Pitfalls



- Not developing an up front prioritized list of Required and Desired 5 = High, 1 = Low specs
- Not requiring all RFP respondents to specify in writing if and how their system can do *each of your key things*
- Foundations grossly underestimate all of the work necessary for their staff to decide, specify and configure the new system

IMPORTANT INSTRUCTIONS: Please describe your ability to meet each of our specified system requirements. Please do this by completing the Vendor Response column of this document. When:

1. Currently available and is fully functional exactly as described in the latest production version of your product and/or service.
2. Similar but with some limitations compared with what is described. Then clearly describe all limitations.
3. Not currently available, and, if shown as "Required" what you propose with a guaranteed delivery date and cost (if applicable) from the date of contract signing. Please clearly specify if.
4. To be ABC'd for future integration into the core system exactly as we've described for all clients vs. being specific to us. Please specify the guaranteed

Function	Description	Required or Desired 5-Rtg	Vendor A	Vendor B
User Interface				
Windows XP/Vista workstation	Fully compliant with Microsoft's Windows XP workstation and Windows Vista Common User Access	Required	1- The ABC system maintains full compatibility with Microsoft's technical environment.	1
Generic browser and platform support	Full support of Internet Explorer 7.0 and later, Firefox 2.x and later, and Safari 3.0 and later. Accessible from all Windows and Macintosh PCs.	Required	1- Functionality provided via integrated web portal that can be configured and supports proxy browsers.	2- Restricted to Web based components of the ABC suite.
Ease-of-use	Graphic user interface that has well-thought screens, fluid/rapid navigation, and functions consistently with other supported Web and Windows applications.	Required	1- The ABC system was designed in collaboration with end-user groups that specified the user/ABC requirements.	1
Searchable online help	Online help that describes the capabilities of the system, includes a searchable index.	Required	4- Online help is not currently available, but is planned for future releases - 2nd Qtr 2009. THAT'S OK.	1
Windows interface	The application is fully screenable and functional via a Microsoft Windows interface.	Required	1- Fully Windows compatible.	1
Web interface	The application is Web enabled and is fully accessible and functional via a supported Web browser.	Required	2- The ABC system is interfaced with an integrated web portal to handle core functions, but the ABC system is not currently web-enabled BUT IS THE WEB PORTAL AN EXISTING PACKAGE-ABC, MODULAR PRODUCT OR A CUSTOM DEVELOPED SYSTEM?	THIS IS A BIT CONFUSING. ABC IS A WEB APPLICATION BUT ABC IS A WINDOW'S APPLICATION. ABC CAN BE ACCESSED VIA WEB OR CTRX FROM A WEB
Full screen display	All screen displays (except pop-up windows) will display full screen regardless of the monitor size and display resolution. Text elements will be designed to fill the screen to make optimal use of display space regardless of Ability for a supervisor to see the status of all proposal and grants assigned to collected staff.	Required	1- All key screens are full screen display.	1
Supervisor view	Ability to add, delete, move Web parts if these exist. This can either be done and locked by the system administrator for groups of users, or with appropriate rights users can have personal settings of favorite queries, reports.	Required	1- Records can be associated with staff, but not limited to just those staff. Supervisors can see which staff are associated with cash record.	1
Web parts design	Ability to add, delete, move Web parts if these exist. This can either be done and locked by the system administrator for groups of users, or with appropriate rights users can have personal settings of favorite queries, reports.	Required	1- While the main ABC system is not web-based, the web extensions provided for the ABC system can be fully modified by the end user.	BUT ONLY USING ABC, NOT ABC
Saving personal favorites	Ability to add, delete, move Web parts if these exist. This can either be done and locked by the system administrator for groups of users, or with appropriate rights users can have personal settings of favorite queries, reports.	5	1- Key parts of the ABC system (those public views) can be configured for each user.	1 DOES THIS BETTER BY EACH USER THEMSELVES
Custom help screens	Capability for the system administrator to easily create new customized on-screen help to improve the accuracy of data entry.	5	4- On-line help is not currently available but is planned for future releases - 2nd Qtr 2009. THAT'S OK.	1
Collapsible code table listing	Code tables can be easily expanded and collapsed (7/8" is especially helpful for complex multi-level code tables)	5	1- All code tables are multi-level and configurable.	1
List used queries	Screen drop down list of list used queries for quick access.	4	1- Recently accessed lists available throughout the ABC system.	1
Personalized view by individual	Enable individual users to choose their own default startup view that specifies what data is presented and how it is sorted. The presentation of data can be filtered to display only those tables that are the responsibility of the user. The user can check/ABC this at any time.	4	2- While public/ABC with user defined quick links is configurable for each user.	1
Tree view	Display of contact subtables in a hierarchical tree view.	4	1- Function is available through tight integration with RE (FE SOUNDS GOOD, LET'S SEE THIS)	

Selecting a New System

The Pitfalls



- No personalized demo script with your key specs for each vendor to adhere to in the live presentation of their latest current production system

Global Foundation



Vendor / Service Provider _____

Demonstration Requirements

Proposal finalists will be invited to demonstrate the current standard (not customized) production version of their system on our standard configuration Windows 10 64-bit PC (provided by the vendor) using Internet Explorer v10 in March 2017. You will be presenting to the project team (as described above) either in person or by webinar

During your three-hour demonstration, would you please be sure to:

1. The features and functionality noted below must be demonstrated first. Time permitting, you are invited to share other key features of your system.
2. Expect and allow adequate time for questions throughout your presentation.
3. Please manage the time carefully to ensure that you have allotted sufficient time to demonstrate all the required features.
4. Please order the sequence of the demo in the sequence shown below.
5. Specifically indicate which feature will be demonstrated next so that we can all follow along and ensure we cover all required items.
6. If your system cannot currently do one or more of these capabilities then please explain this up front, skip it, and continue.

Rating scale:

- 5 = Excellent - Does completely and easily
- 4 = Very good - Does completely but not easily (e.g. not intuitive, many steps)
- 3 = Good - Does in an acceptable way (possibly using a workaround)
- 2 = Poor - Does poorly
- 1 = Unacceptable - Cannot use as is
- 0 = No current capability

Capability	Ratings	Comments
1. Demonstrate proposal submission, intake and review.		
A. Submit an <u>invited online proposal</u> (with a URL, login ID and password) for a new grant.		
B. Demonstrate <u>receipt of proposal and reports from the grant maker perspective</u> , including associated status changes (e.g. required report received and then automatic coding that it is in pending review and finally approval).		
C. Demonstrate a <u>reviewer portal</u> and how scores and narrative comments are entered and then accessible to program staff, grants manager, and potential external reviewers.		
2. Demonstrate a <u>grantee portal</u> and how a grantee can: <ul style="list-style-type: none"> - update their <u>previously entered</u> contact information - see how we can review and approve contact information changes - see requirements due - submit a progress report that includes both data fields and a required attachment such as an Excel budget 		

Migrating to a New System More Pitfalls



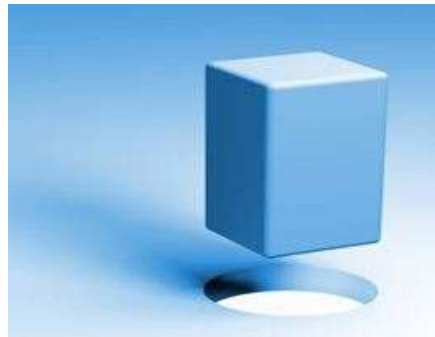
- Missing key capabilities in the new system that *you assumed would be there* just like the former system
- Lack of comprehensive new system acceptance testing *by the grantmaking staff*
- Finding and fixing lots of duplicate organizations, requests, and contacts
- Missing data and documents that weren't migrated because *they weren't provided*



Case Study

Poor Legacy System Integration

- Our legacy non-integrated systems don't/didn't work well together at all
 - What things caused this major limitation?
 - What do we now need to do when selecting and configuring our new fully web-based remotely hosted system to prevent this from happening again in the future?



Case Study

Reliability and Pot Holes

- Many of our Windows workstations are locking up and aren't running reliably
 - What are possible causes of these serious "pot hole" problems? How can we fix this?
 - How do we prevent this from happening again in the future?



Case Study

System Acceptance Testing

- We discovered that after we cut over that all user access doesn't work and our data migration wasn't complete.
 - What was missing?
 - Why did this occur?
 - What should we have done differently?



Web User Interface Issues

- All claim to provide broad Web browser access to your grantseekers, grantees, staff, reviewers, board, and the system administrator

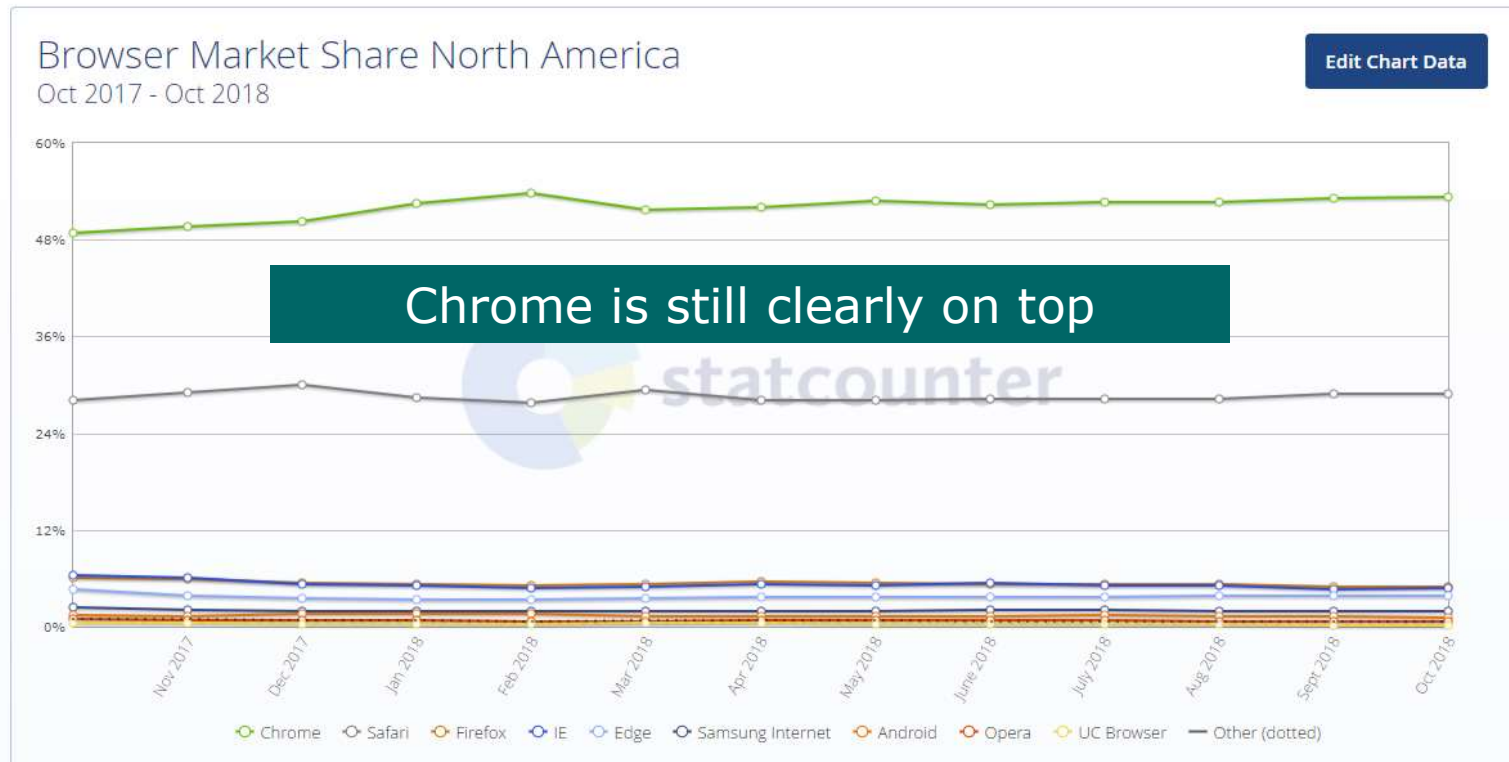


But there are many problems with the different browsers and versions

- Some are providing limited access to mobile apps



Browser Use in North America



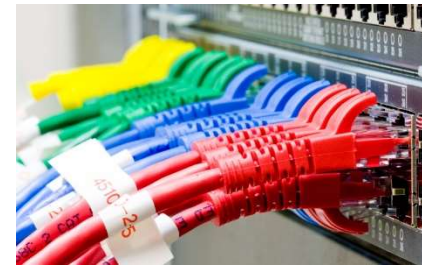
Browser Use Worldwide



Case Study

Slow System Response Time

- Our system response time is extremely slow accessing and running searches and reports from our remotely hosted web-based grants management system
 - What are possible causes of this problem?
 - What tests can we run to find out and verify the suspected causes?
 - What do we need to do to fix this?





The actual speeds of Internet access from different locations

- Internet speed tests were run from <https://www.speakeasy.net/speedtest> to test upload/download speed from nonprofits worldwide to a grantmaker's NYC-based server

Location	Download Speed	Upload Speed
New York City	86.2 mbps	87.2 mbps
Manila, Philippines	20.02 mbps	19.94 mbps
Other Philippines locations	3-5 mbps	3-5 mbps
Sao Paulo, Brazil	7.87 mbps	5.78 mbps
Dhaka, Bangladesh	1.1 mbps	2.4 mbps

50 Lane Traffic Jam in Asia

See the bottleneck of all traffic narrowing after the toll



Case Study

Overall System Security

- We have security problems – we keep getting computer viruses and security breaches that shut down our systems.
 - What are some of the most likely causes of this serious problem?
 - How can this now be fixed?
 - What can we do to prevent this from happening again in the future?
 - Would Single Sign On (SSO) be helpful?



Case Study

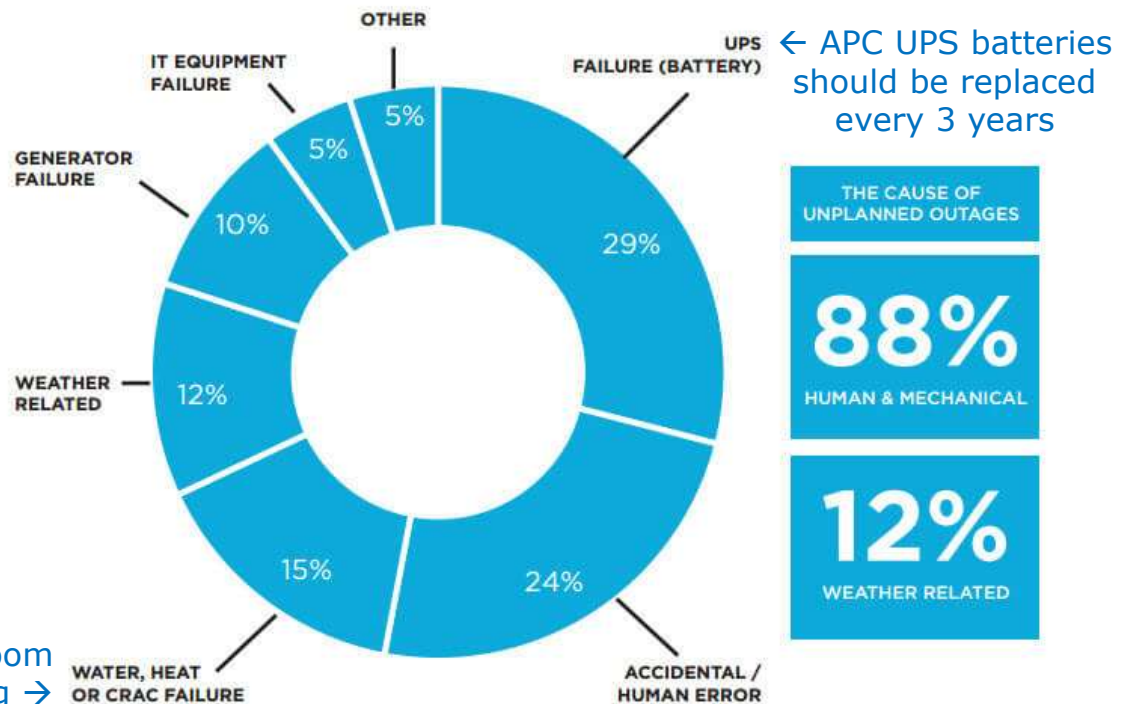
Backup & Disaster Recovery

- We just had a major disaster and are now unable to recover any of our production system data.*

- What are the likely causes of this real world* problem?
- What do we need to do to prevent this from happening?
- How can we test that it will actually work?



Causes of Data Center Outages



CRAC = Computer Room Air Conditioning →

Some Key Pitfalls

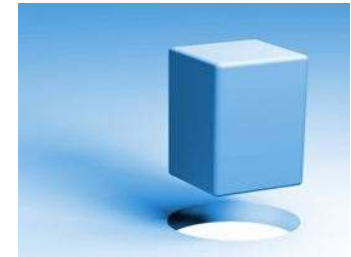


- An unbalanced legal agreement with no recourse that favors only the service provider
- Believing everything that you were told without documenting this in writing as part of the contractual agreement
- Changing of the guard on both the grantmaking and the service provider staff
- Genuine misunderstandings between your staff and the service provider's project manager



Some Really Good Advice

- Just because you can do it doesn't mean you should do it!
- Technology alone really won't solve all of your problems
- Before changing do your homework
 - Identify the *real pros and cons*
 - Conduct *site visits*
 - Ask lots of really *good questions*
 - Be realistic about *risks*





Time for spirited questions!

mbs@iaa.com
609-924-6936