Packing Up and Moving On(line): Selecting and Migrating to a Fully Web-Based Information System

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Martin Schneiderman
President
Information Age Associates
47 Murray Place
Princeton, NJ 0540 USA
mbs@iaa.com
www.iaa.com
609-924-6936
Key Topics

- Key concepts, terminology and security
- Advantages of moving online to a fully Web-based system
- Questions about moving to a fully Web-based system
- The key questions to ask
- How to migrate successfully
- Q&A
Key Concepts, Technology and Security Impacting Foundation Information Systems
Technology Trends Impacting Foundation Information Systems

- **Web based portals** with easier and differentiated user interfaces (UI) replacing Windows applications
- **Expanded use of online applications** and **online grantee reporting**
- **Migration to Cloud based systems**
- **Quickly growing use of iPad tablets**
- **Growing use of Android and Apple smartphones worldwide**
Technology Trends Impacting Foundation Information Systems

- More, faster and better broadband Internet access
- Increased telecommuting by senior management and program staff
- Expanding multi-tenant cloud computing
- Multiple browser types and versions plus 32 and 64-bit Windows 7 and 8 makes system development, integration and support more difficult
Lasting Companies Know How to Re-invent Themselves

"Lasting companies know how to re-invent themselves.

You’ve got to reinvent the company to do some other thing, like consumer products or devices.

You’ve got to be like a butterfly and have a metamorphosis."

Source: Mike Markkula – Apple’s first investor

Source: Excerpt from Walter Isaacson’s Steve Jobs, page 320
Different Types of Foundation Services

1. All Microsoft Windows

2. All Microsoft Windows and accessible from inside a browser using remote access programs (e.g. Windows Terminal Server, Citrix GoToMyPC or XenApp, or Windows Remote Desktop Connection)

3. Hybrid Windows and Web browser

4. Fully Web browser
Enhanced Windows GIFTS Alta and “Classic” GIFTS
Enhanced Windows GIFTS Alta and “Classic” GIFTS
Fully Web Browser User Interface
Fully Web Graphical User Interface
Fully Web Graphical User Interface
Fully Web Graphical User Interface
Apple iPad User Interface
Location and Platform Differences

**Location**
- In-house on your server(s)
- On remotely hosted servers

**Platform**
- Practically all of the system provided by ONE vendor
- The core platform provided by one vendor plus the grants management system and utilities each provided by DIFFERENT vendors
Is it all **ours** or is it **shared**?

**All ours**

1. On a hosted server that is used **ONLY** by your organization
2. Your data always stored in **YOUR OWN DATABASE**

**Shared**

1. On a hosted server that is **SHARED** by many organizations
2. Your data stored in a **SHARED DATABASE** (just as the bank does)
Remote System Security

- **Hypertext Transfer Protocol Secure (HTTPS)** is a widely used and a **MUST HAVE** communications protocol for secure communication over a computer network such as the Internet.

- Authenticated Single Sign On (SSO) restricts remote system access to computers from a specified location. It’s used mostly by corporate grantmakers.
Local Windows Applications vs. Hosted Web-based Applications

“In a recent report, Gartner, the information technology research company, called Google “the only strong competitor” to Microsoft in cloud-based business productivity software . . .”

Key Questions to ask to Make a Well Informed Decision

- Which currently integrate tightly with your grants management system and will continue to be supported by the provider?

- Which are used most often by foundation staff, grantseekers, grantees, reviewers and others in the workplace?

- Which have all of the built-in capabilities that your staff really need? SharePoint?

- Which are affordable when purchased at a discount from TechSoup Global?
  [Link](http://www.techsoup.org/stock/Default.asp?cg=lnav&visit=1)
23 North American Integrated Foundation Information System Software and Service Providers
Review the "Hosted Service" and "Technology Platform(s)"

### Integrated Foundation Information System Hosted Service Providers and Software in North America – 2013

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Active/All Clients</th>
<th>Total Product Staff</th>
<th>Types of Clients</th>
<th>Currently Available and Supported Products &amp; Services</th>
<th>Delivered New Products, Features and Services Added in 2011 and 2012 (Including New Products and Services)</th>
<th>Supported Interoperability with Other Applications</th>
<th>Hosted/ASP Service</th>
<th>Technology Platforms</th>
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<tr>
<td>Altum</td>
<td>26 VCs, 73 corporate</td>
<td>32 staff</td>
<td>Medium-to-large Federal &amp; State agencies, Biomedical grantmaking organizations</td>
<td>Easygrants (E-G): - Program Management, - Fund Source Tracking, - Application, Review (external and/or internal, individual &amp; committee/panel). Gantt Financial &amp; Progress Reporting, Grants Management, Contact Management, Risk Management, Workflow Configuration, Workflow Management, Integrated Document Management (SharePoint), - Queries, Performance Dashboards, BI, proposalCENTRAL® (PC): - Application, Review, Progress Reports, Grants Management, Contact Management, Queries &amp; Reports, Altum Query Module®</td>
<td>Easygrants: - System performance enhancements for faster end user response time and increased scalability. Expanded Review Module to simplify meeting planning and attendance tracking and scoring and evaluation for funders. Added more data standard forms with increased form task and workflow configuration flexibility. CRM and communication enhancements. Added Risk Mgt. module - LDAP Active Directory integration for enterprise single sign-on support. proposalCENTRAL: - Staff portfolio management - More built-in reports - Additional user roles and permission management - Customizable e-mail templates and merge codes - Enhanced workflows with carry-forward and budget change tracking - Review process improvements - broader flexibility in evaluation forms - streamlined navigation for reviewers, and robust data and reports for review process analysis - Increased audit control of reviewer confidentiality and conflicts of interest. SharePoint online application support for &quot;by invitation only&quot; programs.</td>
<td>- Microsoft Word, - Microsoft Excel, - Microsoft Outlook, - Microsoft SharePoint, - Foundation Center Grant Reporting, - Report Writers and Business Intelligence Software (e.g., Crystal, Cognis), - Custom links to accounting systems, - Custom links to CRM systems, external authentication systems, and website content, - Web services for interoperability with grant and ERP systems</td>
<td>Altum is offered as a licensed enterprise software with optional hosting or as a SaaS service</td>
<td>Web browser user interface for all systems. Supports all major web browsers (Internet Explorer, Mozilla, Opera, Firefox, &amp; Safari – on Macintosh, Windows, and Linux/Unix clients). Architecture is predominantly Microsoft-based technology – .NET, IIS web server, SQL Server database, SharePoint document management. Interfaces via open standards: XML, Web services, SOAP.</td>
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**SOURCE:** [http://www.iaa.com/resources.html](http://www.iaa.com/resources.html)

5,057 U.S. grantmakers reported
332 non-U.S. grantmakers Reported
System Options - Today and Tomorrow

Today’s systems
- Basic system with limited flexibility

Some of Today’s Systems and Tomorrow’s opportunity
- More flexible open personalized (not customized) fully Web-based systems that can be enhanced and linked to other applications and data

Highly customized one-of-a-kind system
Compatibility with All PC and Mac Web Browsers Worldwide is Very Important
Browser Use in **North America**

Internet Explorer on top and relatively stable among the top three
Browser Use in Africa

Firefox and Chrome on top with Internet Explorer decreasing
Browser Use in Asia

Chrome on top with Internet Explorer decreasing
Advantages of Moving Online to a Fully Hosted Web-based System

1. You only need a Web browser and Microsoft Office + Outlook installed locally

2. The grants management service provider:
   - Maintains all of the server system hardware
   - Regularly upgrades the system software
   - Ensures continuing links to local applications and online services
   - Backs up all of your grant data

3. Very easy remote access from anywhere
More **Advantages** of Moving Online to a Fully Hosted Web-based System

4. *Somewhat* reduced need for in-house IT support

5. Overall system value to streamline operations
Moving from one system to another is like changing the tires on a moving car.

Car changing tires while moving – start at 1:46
http://www.youtube.com/watch?v=N_loMXs6l70
Questions about Moving Online to a Fully Hosted Web-based System

1. Greater dependency on Internet access and the service providers than ever before.

2. How many different service providers and products will you require to make and keep the whole system working?

3. Do they have a successful business model?

4. Does their staff really understand grantmaking operations and regulations?
Questions about Moving Online to a Fully Hosted Web-based System

5. Who tests ALL of the products to ensure that they all keep working after upgrades?

6. Data conversion FROM your current systems and also TO a successor system?

7. Make sure your demo is of the standard system – not a costly customized version?

8. What functionality do you currently have that WON’T be in the hosted system? Is that OK?
Questions about Moving Online to a Fully Hosted Web-based System

9. Personalized Web portals for each user type with graphics and interactive dashboards?

10. What links does it currently have to internal and external services? (e.g. GuideStar Charity Check, OFAC, NGOsource, accounting)

11. Ongoing major investment in R&D with regular releases?

12. Is the user interface the same across the key systems?
Questions about Moving Online to a Fully Hosted Web-based System

13. Easy personalization? (NOT costly customizations)

14. Saving and naming favorite searches, views plus many standard reports?

15. Globalized multi-lingual (e.g. Nicolás, René) and multi-currency products?

16. Are the vendors using industry standard supported software and databases?

17. Systems hosted in secure reliable enterprise class datacenter?
Questions about Moving Online to a Fully Hosted Web-based System

18. Is it designed and tested to handle a high volume and shared load of online applications and users?

19. How good is their communications, project management and user support?
What to **See, Track and Rate** in Vendor Demos

1. **Prioritized features** that you NEED and are **MOST** important to **YOU**

2. **Count the number of steps** to do **routine operations** (e.g. download online applications with attachments)

3. **Creating and using saved searches, views and reports**

4. **How integration with 3rd party services** REALLY works

5. Permit vendor’s to demo their wonderful **distinguishing features**
Time for spirited questions!
See the Information Age Associates Web site for more up to date information

http://www.iaa.com