

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

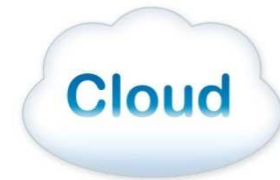
- Key concepts, terminology and security
- Advantages of moving online to a fully Web-based system
- Questions about moving to a fully Web-based system
- The key questions to ask
- How to migrate successfully
- Q&A

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



Windows 7™



Windows 8

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."



Mike Markkula, right, Apple's first investor and father figure to Jobs.

Fired by Jobs in 1997 his parting advice called for re-invention.

Source: Mike Markkula – Apple's first investor

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*)

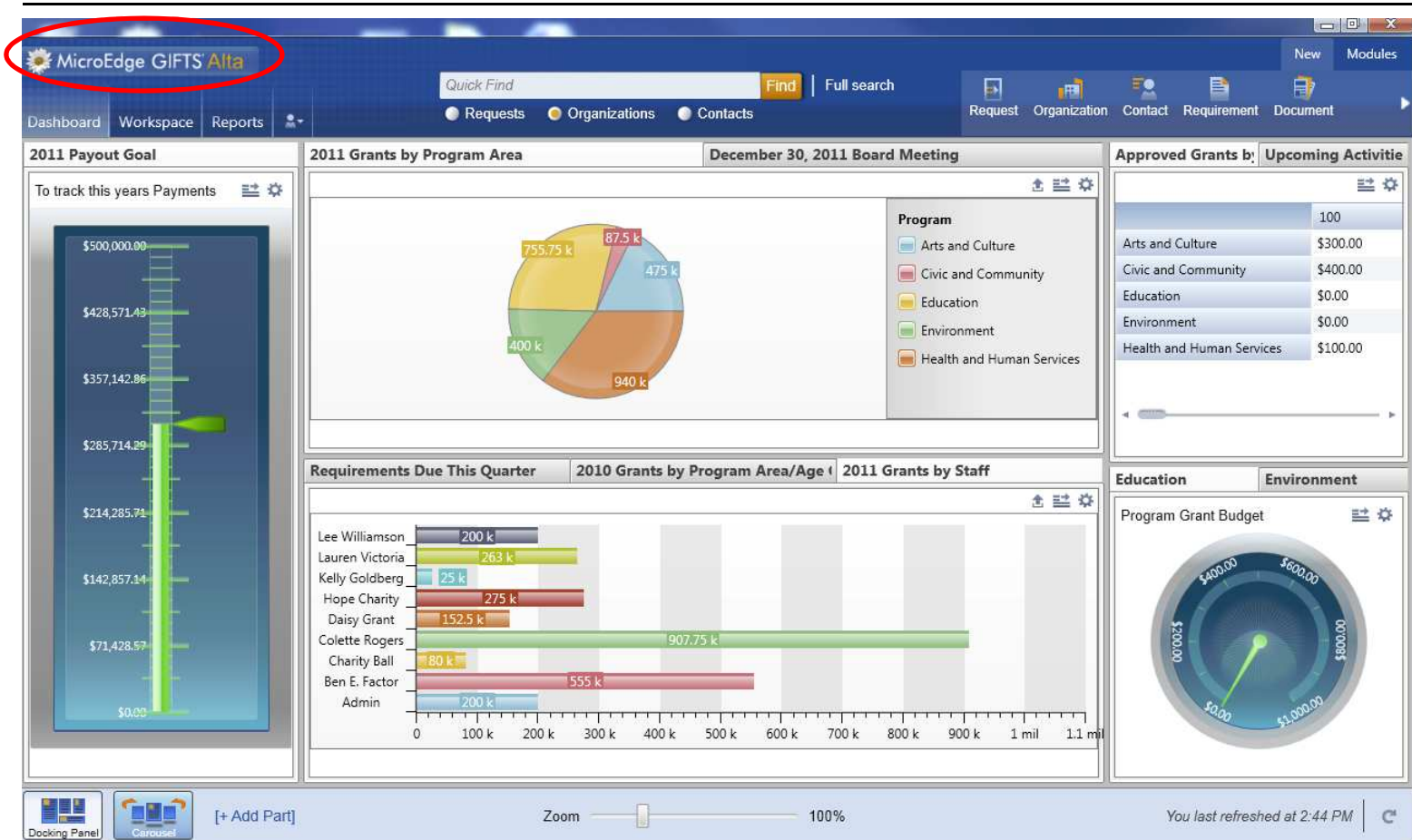


3. Hybrid Windows and Web browser

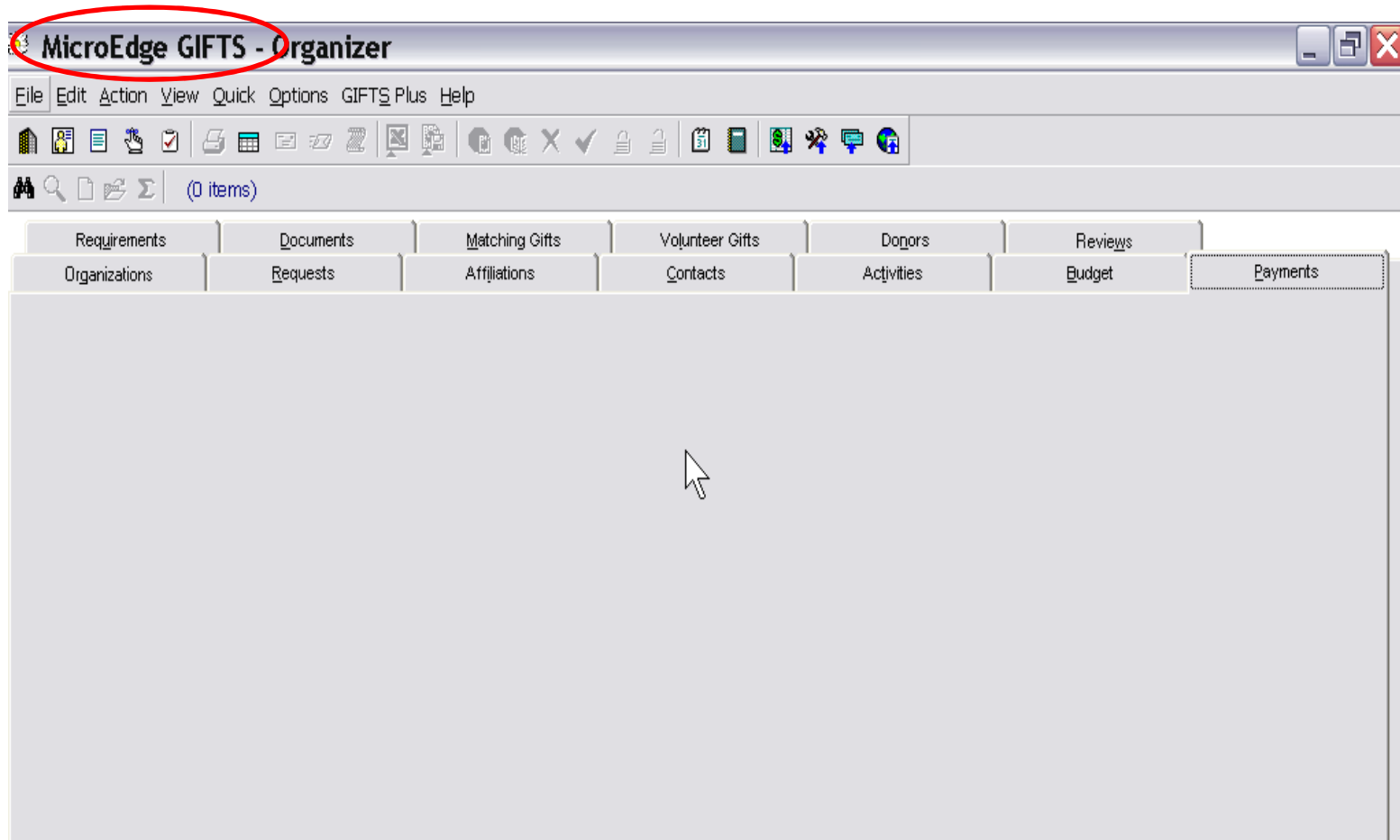
4. Fully Web browser



Enhanced Windows GIFTS Alta and "Classic" GIFTS



Enhanced Windows GIFTS Alta and "Classic" GIFTS



Fully Web Browser User Interface



Microsoft Dynamics CRM Akoya Admin Akoyabase Sign Out

File Dashboards

Save As New Edit Delete Set As Default Share Dashboard Assign Refresh All Advanced Find

Dashboard Management Action Query

Grant Mana... Dashboard: Executive Center

Akoya Workplace

- Dashboards
- Requests
- Activities
- Constituents
- Contacts
- Requests Payments
- Requests Requirements
- Requests Budgets
- Requests Roles

Akoya Extras

- Announcements
- Articles
- Calendar
- Dashboard
- Duplicate Detection
- Imports
- Queues
- Reports

Grant Management

Settings

Contacts: Board Member List

	Full Name	Address 1: Stre...	Address 1: Stre...	Address 1: City (...)	Address
	Annie Labrith			Missoula	MT
	Bruce Andersen	3000 S Russell St		Missoula	MT
	Dana Kraft	311 Young St		Medicine Lake	MO
	Jerry Reynolds	332 Minnesota St	#E1436	St Paul	MN
	JoAnne Selig				
	Keri Poepppe			Maputo	MN
	Matt Van Dyke			Maputo	MN

1 - 7 of 7 (0 selected) Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Requests: Denied Requests

	Title	Applicant	Decision Date	Requested Amo...	Denial
	Art Classes	Missoula Commur	5/28/2010	\$2,500	Outside o
	Big Sky Resort Art Fair	Medicine Lake Scr	5/28/2010	\$1,500	Outside o
	Development of Day Cam...	Windy River Natu	5/28/2010	\$25,000	Unable to
	New seedlings for Rogers...	Sierra Club Minne	9/15/2010	\$5,000	
	Sponsorship of Annual Ci...	Great Falls Humar	5/28/2010	\$1,200	Unable to
	Support for Imagination ...	Helena Public Libr		\$3,500	
	Trail Building	Windy River Natu	5/28/2010	\$4,800	Unable to
	Water and Campfire Safet...	Girl Scouts of Billi	5/28/2010	\$2,300	Incomplet

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All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Requests Payments: Request Payments Read...

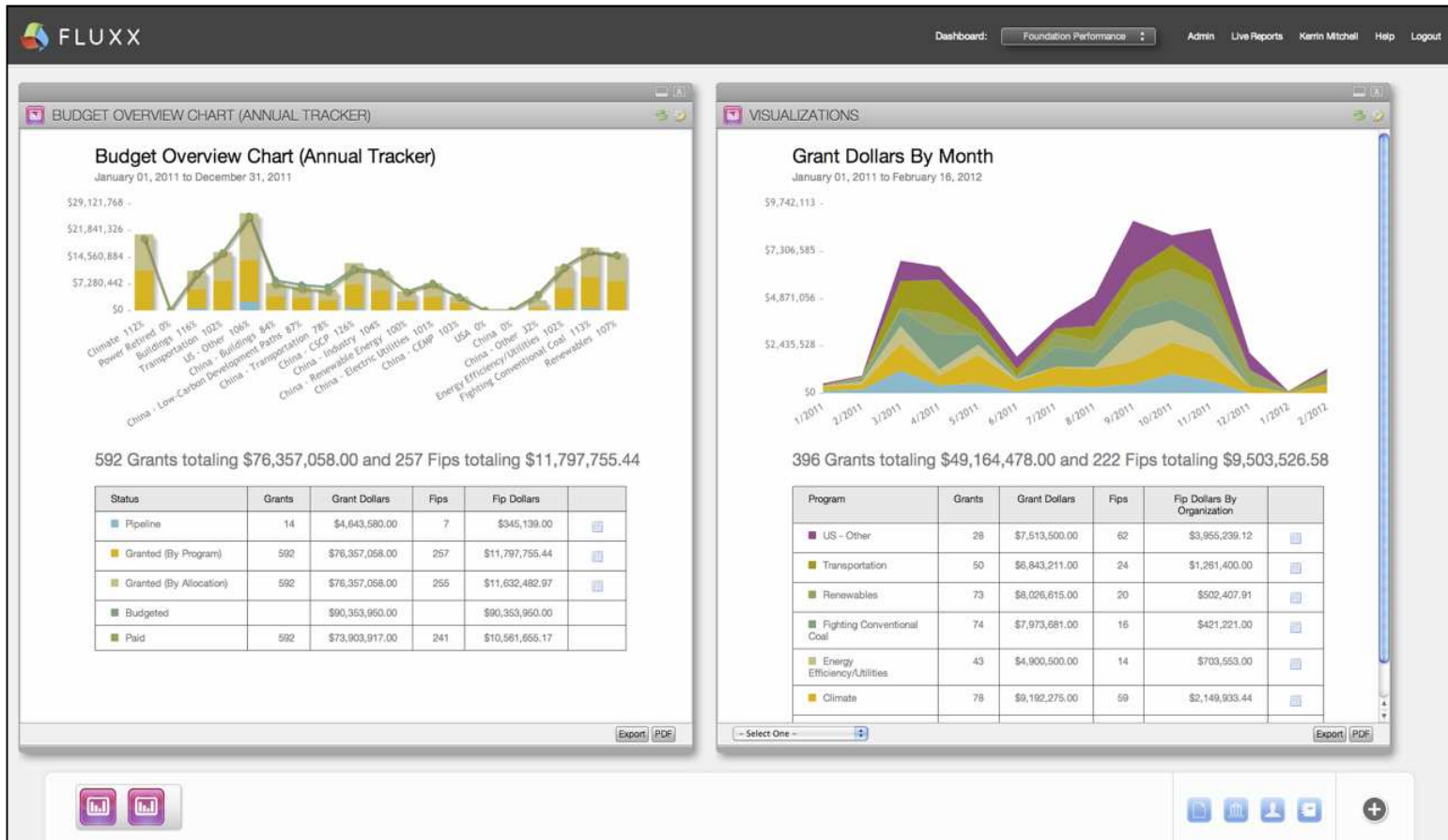
	Payee	Amount	Address 1: City (...)	Grant Amount (...)	Program (Requ...
	Friends School of	\$25,000	Minneapolis	\$25,000	Youth
	Oak Terrace Comm	\$2,500	Ingomar	\$5,000	Discretionary

Awards by Program

All Awards and Requests

100%

Fully Web Graphical User Interface



Fully Web Graphical User Interface



Fully Web Graphical User Interface



MicroEdge GIFTS Online

Welcome, Marty Schneiderman

Requests Organizations Contacts

Request Organization Cont

Layout Settings Add Part

Map of Our Grants

Charles Stewart Mott Foundation

powered by FOUNDATION DIRECTORY ONLINE

Recipient Type Primary Subject

Geographic Display

- U.S. Map
- World Map

Year

- All
- 2012
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003

Recipient Type

- All
- Agriculture/Food
- Animals/Wildlife
- Arts and Culture
- Civil/Human Rights
- Community Development
- Crime/Law Enforcement
- Education
- Employment
- Environment
- Health
- Health Organizations
- Housing/Shelter
- Human Services

U.S. Giving by Recipient Type, \$779,788,018 to 849 Recipients for 3,533 Grants

Click on a state to see more detail.

Legend:

- Under \$1,000,000
- \$1,000,000 to \$9,999,999
- \$10,000,000 to \$19,999,999
- \$20,000,000 and Over

Map Parameters: Recipient Types: All, Years: 2003-2012

Location	Amount	Recipient Count	Grant Count
Michigan	\$300,507,893	179	907
District of Columbia	\$169,585,110	157	815

Grants by Program Area YTD

Legend:

- <Not Specified>
- Arts and Culture
- Civic and Community
- Education
- Environment
- Health and Human Services
- Other

Cash Grants for Initial Review

ID	Organization Name	Primary Contact	Project Title
370	Teen Aid Center	Mr. George Nottingham	"Help Yourself" film production
628	Lower West Side Child Care Center	Mr. David Moore	General Operating Support
635	University of America	Mr. Lawrence M. Stewart	"Archiving America" Initiative
45	The Children's Fund	Mr. Charles Roberts	Refurbish library

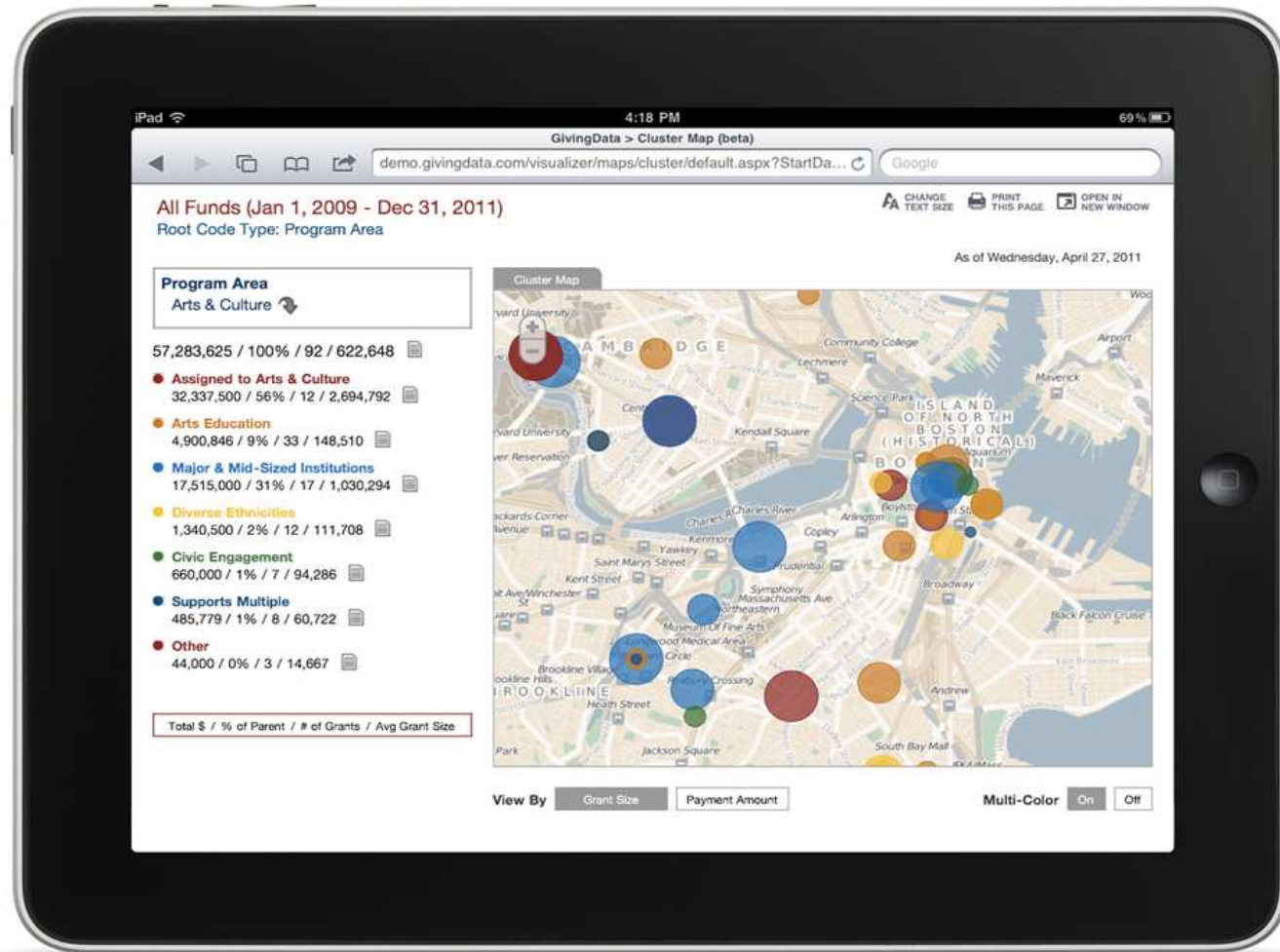
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Cash Grants for Staff Review

ID	Organization Name	Primary Contact	Project Title
367	California Children's Theatre	Mr. David Anderson	operating support for the Theater's
607.01	Big Brothers Big Sisters of New York City	Ms. Mary Jones	Mentoring Children of Prisoners
618	United Federation Inc.	Mr. Doug Smith	The Cloisters Restoration Project
775	Children International	Mr. James R. Cook	Nutritional Health Program

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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

- **H**ypertext **T**ransfer **P**rotocol **S**ecure (**HTTPS**) is a widely used and a **MUST HAVE** communications protocol for secure communication over a computer network such as the Internet.

HTTP =  <http://www.gmnetwork.org/>

HTTPS =  https://www.grantrequest.com/SID_1082/Default.asp?CT=CT&SA=AM&FID=&SESID=4236&RL=

- **A**uthenticated **S**ingle **S**ign **O**n (**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



+



**Microsoft
Outlook**

OR



Google docs



Google
Mail

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

SOURCE: New York Times, December 26, 2012

http://www.nytimes.com/2012/12/26/technology/google-apps-moving-onto-microsofts-business-turf.html?hpw&_r=0&pagewanted=all

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?




<http://www.techsoup.org/stock/Default.asp?cg=Inav&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

Vendor (Year of first grant software or service)	Active GM Clients on 1/1/2013	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services added in 2011 and 2012 (In multiple client production in 2012)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
 Altum (1998) 877-GO-ALTUM 703-657-8299 www.altum.com info@altum.com 12100 Sunset Hills Rd Suite 101 Reston, VA 20190	20 Easy-grants clients 73 proposal-CENTRAL clients 26 Federal clients using PC, EG and other Altum grant related solutions 5 non-US clients (1 PC, 4 EG)	32 staff	Medium-to-large foundations Federal & State government agencies Biomedical grantmaking organizations	Easygrants® (EG) – Program Planning & Management – Fund Source Tracking – Application – Review (internal and/or external; individual & committee/panel) – Grantee Financial and Progress Reporting – Grants Management – Contact Management – Risk Management – Workflow Configuration – Workload Management – Integrated Document Management (SharePoint) – Queries, Reports, Dashboards, BI proposalCENTRAL® (PC) – Application – Review – Progress Reports – Grants Management – Contact Management – Queries & Reports Altum Query Module ® Altum Financial Management and Costing Applications (based on Infor Performance Management) Mobile Applications and website re-engineering for mobile device support	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 configuration flexibility – Added more standard data 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 financials with carry-forward and budget change tracking – Review process improvements - broader flexibility of 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 – Streamline online application support for “by invitation only” programs	<ul style="list-style-type: none"> • Microsoft Word • Microsoft Excel • Microsoft Outlook • Microsoft SharePoint • Foundation Center eGrant Reporting • Report Writers and Business Intelligence Software (e.g., Crystal, Cognos) • Custom links to accounting systems • Custom links to compliance verification service(s) • Custom links to CRM systems, internal authentication systems, and website content • Web services for interoperability with grant and ERP systems 	Easygrants is offered as licensed enterprise software with optional hosting or as a SaaS service proposal-CENTRAL is a SaaS service	Web Browser user interface for all systems. Supports all major web browser platforms: Internet Explorer, Netscape, Opera, Firefox, & 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

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

Highly customized one-of-a-kind system

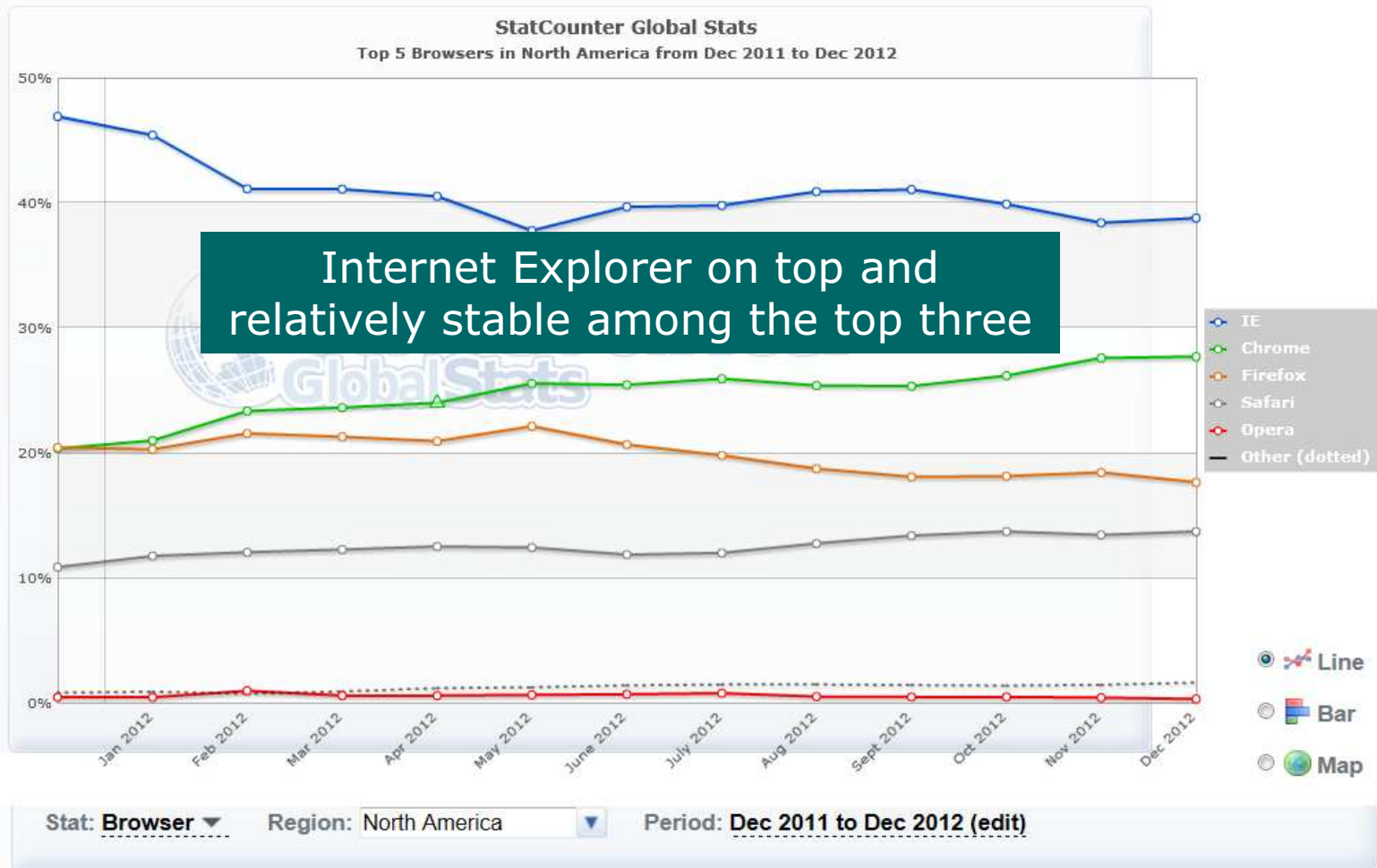
Some of Today's Systems and Tomorrow's opportunity

More flexible open personalized (*not customized*) fully Web-based systems that can be enhanced and linked to other applications and data

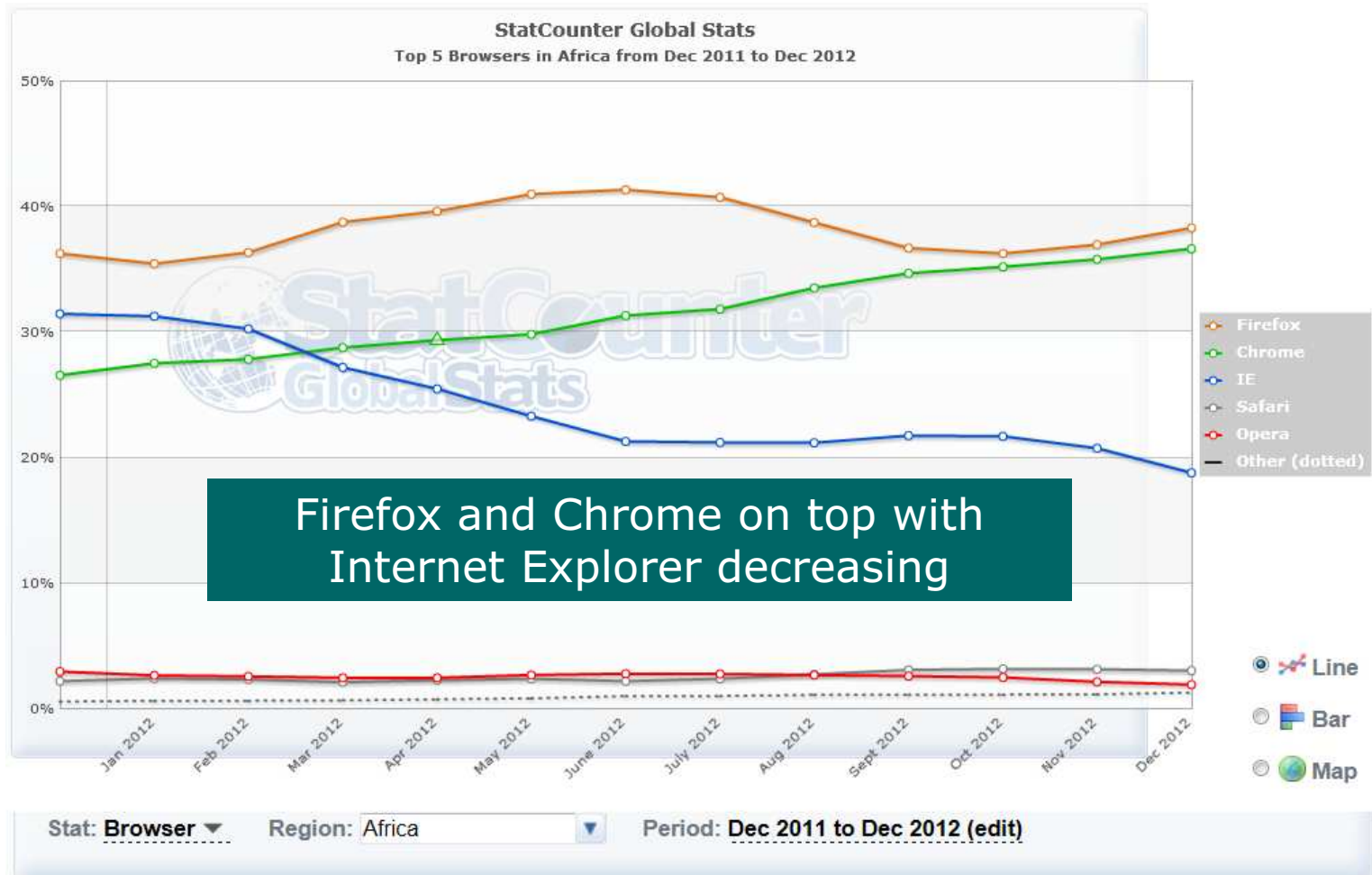
Compatibility with All PC and Mac Web Browsers Worldwide is Very Important



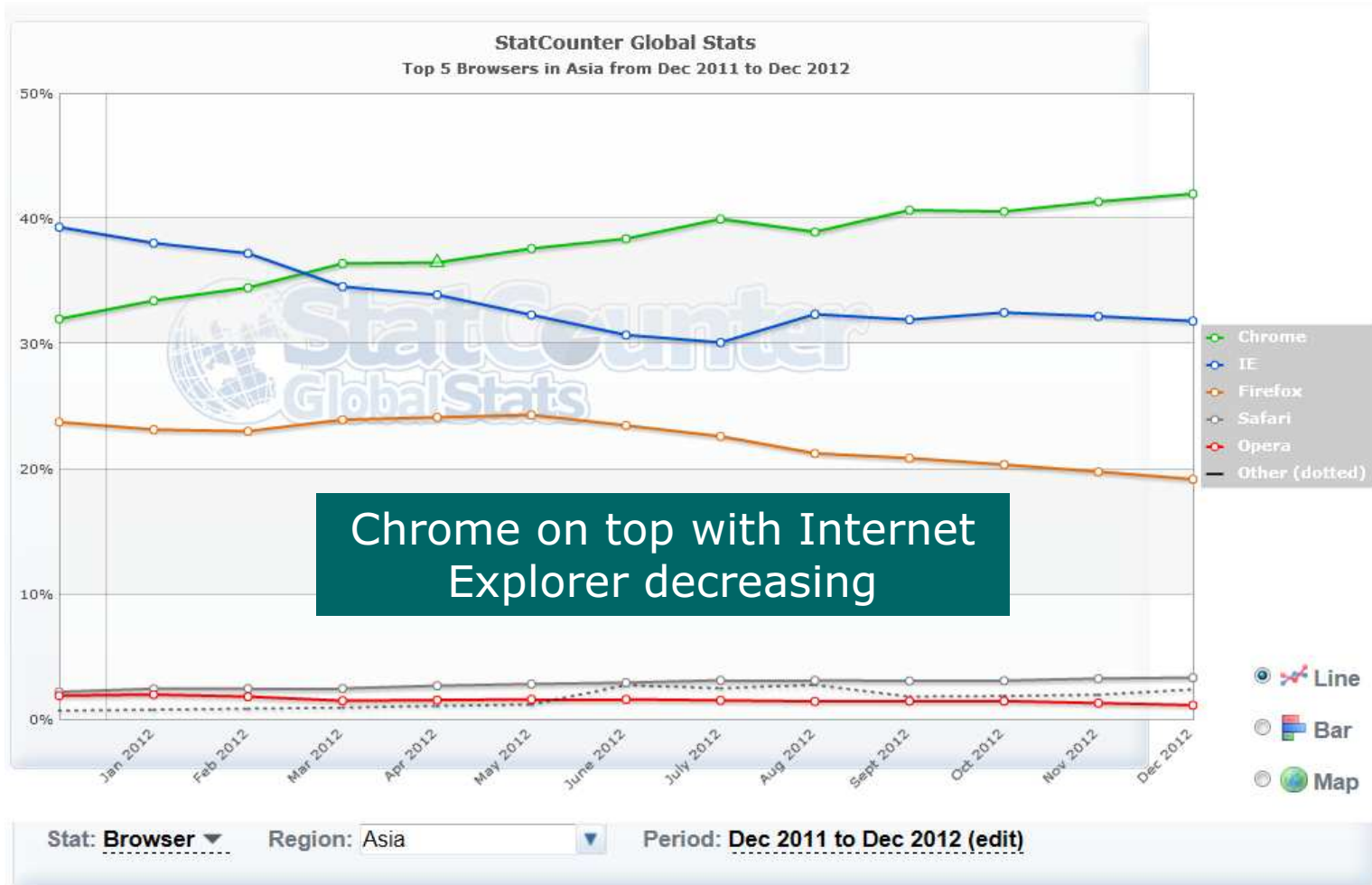
Browser Use in North America



Browser Use in Africa



Browser Use in Asia



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



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

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>