

Managing Agency and Community-change Initiative Data: Software Summaries

United Way’s community impact work requires data from agencies/programs and community-change initiatives to meet staff and volunteer needs throughout the organization. In response to the challenges of managing this data, United Ways are seeking software that is affordable, able to manage a wide range of agency/program and initiative data, and able to interface with current software used by both the United Way and its community partners.

This report was developed to help United Ways identify commercially available software to meet their needs. Vendors have provided 2-page descriptions of their products including capabilities, hardware requirements, training options, costs and other descriptive information. The descriptions were written to give a brief summary of each product. If you believe any of these products may be helpful for your United Way, contact the vendor directly for further information. URLs in the reports are linked to the vendors' Web sites. **UWA has not evaluated and does not endorse any of these products.**

This report is available on United Way Online (Keyword: CISoftwareSummaries) under Outcome Measurement Resources and to the public through United Way of America’s (UWA) Outcome Measurement Resource Network (OMRN) at www.unitedway.org/outcomes/. Information from additional vendors is welcome. Contact Roger Wood at roger.wood@uwa.unitedway.org. See *Managing Agency and Community-change Initiative Data: Guidelines for Software Selection* for assistance in selecting software to manage agency and initiative data on United Way Online (Keyword: CISoftwareSelection) and publicly available through UWA’s OMRN.¹

Summaries are listed as follows:

Software	Vendor	Page
Andar/360 with the Allocations & Outcomes (A&O) module	Helix Ltd.	2
Community Impact Online Data Manager	CommunityTech Knowledge, Inc.	4
Data Collection Analysis and Reporting (DCAR™)	JMPT Consulting	6
eCFund	Seabrooks, Inc.	8
Tapestry	VisionLink, Inc.	10

¹ Not directly related to this report is a parallel list of software for agencies. See *Outcome Measurement Data Management Systems for Agencies* on United Way Online (Keyword: AgencySoftware) and publicly available through UWA’s OMRN.

Andar/360 with the Allocations & Outcomes (A&O) module

Helix Ltd.
7300 Warden Avenue, Suite 503
Markham, ON Canada L3R 9Z6

Product purpose and capabilities

Andar/360, our flagship product, is an integrated database solution allowing United Ways to build a 360-degree view of their community investors, constituents, companies, and agencies. Agencies can currently access donor designation information, manage volunteer opportunities, and maintain their 211 service description through the Andar e-Community Web pages. Andar is the logical place to store and manage allocations and outcomes information for agencies and their programs. Andar provides a consistent and single storefront Web site for the agency to manage all its relationships with the United Way without duplication of effort.

Andar's A&O module provides United Ways with the tools to customize forms for data collection and allows agencies to fill all forms online through the Web. This saves significant time and money for the United Way by making all data available for analysis without re-keying. Andar allows United Ways to electronically collect inputs, activities, outputs, and outcome indicator information for programs and provides the tools to analyze the data. Andar also provides the Web access for volunteers to evaluate programs and, using the allocation worksheet, strategically allocate funds to the high impact programs.

Minimum and recommended computer requirements

Agencies using this product need a Web browser (IE or Netscape Version 5 or better) and Internet access. United Way users need a minimum P2 400MHz, with at least 256Mb of RAM.

Minimum requirements for a network server

The hardware required depends on the size of the organization using the software and the number of agencies being managed.

Training options available

The Andar A&O module requires four days of training at a cost of \$1,000 per day (prices subject to change). Additional half-day Web-based training sessions are also available.

Technical support available

The Andar annual maintenance fee covers unlimited help desk calls and all service packs. Helix also offers customization services.

Type and amount of modification possible

Andar's A&O module includes form designers allowing each United Way to build its own agency and program information forms, budget forms, demographic tracking forms, and other data collection forms. Each of these forms is filled online through a Web browser by the agency and stored electronically within the Andar database. Helix also offers customization services.

Different levels of access available for different users including read-only access

Andar has extensive security functions including user and group level access. Andar also has specific controls over read-only, add, update, and delete functions for each data item within the database. Menu items can also be secured. Each agency staff member can have a user id and password to access specific parts of the agency's data.

Length of time on the market, number of upgrades, and upgrade pricing policy

Andar was released in 1996 and the A&O module was introduced in early 2003. Service packs are released four times a year. All upgrades and unlimited help desk support are included in the annual maintenance fee.

Difference from other products on the market

Andar's advantages include: Built for United Ways; Integrated into the fundraising database; customizable data collection forms; online Web-based data entry; ability to report on all data collected; consistent and single storefront Web site for the agency to manage all its relationships with the United Way.

List of customers willing to discuss their experiences with the product

Yes

Cost of the product

The cost is dependent on the number of United Way users using Andar/360 and all its functions. With Andar, an unlimited number of agencies can access the system and submit forms at the same time and price.

Web site URL

www.andar360.com/Helix/site/CB.jsp

Contact information

Helix toll free: 877-479-3780 x303

Product purpose and capabilities

United Ways vary: program, agency, or hybrid funding; annual, multi-year, or continuous cycles; outcomes and impact reporting at annual, bi-annual, or quarterly intervals; special grant opportunities; logic models from agency, determined by impact-councils, or blended; partnerships approaches with community leaders, agencies, and volunteers also vary.

The CI ODM, designed by and for United Way professionals, is a secure, Web-based, flexible software solution designed to support the entire community impact process. From data collection, evaluation of agencies and programs by staff and volunteers, intra-organizational coordination and communication and enabling community dashboards and impact reporting, with CI ODM your United Way can better achieve and demonstrate community impact results.

CI ODM supports your United Way, volunteers, board, and community partners:

- Create secure data collection forms (agency, program, budget, board, logic model, outcomes, attachments such as 990s, etc.); ODM Designer makes form creation easy
- Agency/partner staff complete drafts and submit their data forms via the Web
- E-mails triggered by events can advise submitter, United Way staff, and volunteers of task completions and next steps
- United Way staff and volunteers may examine and report on data by program, agency, impact area, comparable programs, and demographic served – flexible and extensible report builder, with filtering options, at detail and summary levels
- Site visit forms and interim program/agency evaluation by volunteers available
- Communicate/coordinate: bulletin boards, discussion forums, group/individual e-mails
- Resource library for United Way and community documents and best-practices
- User access configurable to ensure appropriate security and confidentiality by role
- Import/export/synchronize with other United Way systems via CSV/Excel and/or XML

Minimum and recommended computer requirements

CI ODM is optimized for use with Windows and Internet Explorer 6.0 or higher. Mozilla (Firefox) is recommended for use with Macintosh systems. Because the system is entirely Web-based and CTK stores and maintains the data, the only other requirement is an Internet connection and the ability to run those operating systems and Web-browsers. Also, CTK backs up your data nightly.

Minimum requirements for a network server

Not applicable; as a Web-hosted system CTK provisions and maintains the servers.

Training options available

Training is included in the price of the CI ODM. It usually consists of six steps: implementation training, administration training, agency training, train the trainer, ODM designer training, and report builder training. A “regular” United Way staffer, agency user, or United Way volunteer only needs an hour or two of training. “Power users” who create reports or forms need a few hours of additional training.

Technical support available

CTK has full-time technical support representatives and United Way account managers available 8:30 am to 5:00 pm CST, Monday through Friday, to assist users in their understanding and proficiency with the software, or other support. For emergencies, we’re on-call 24 hours per day, 7 days per week, 365 days per year.

Type and amount of modification possible

CI ODM is initially configured by CTK professionals to your United Way's specific data collection needs. The CI ODM allows your United Way to further modify and create grant applications, data collection forms, and reports, as well as manage how the data is disseminated throughout your organization. CTK can provide custom coding for modifications requiring changes in the system's functionality. CTK can also customize the system's visual interface at the organization's request.

Different levels of access available for different users including read-only

Yes, access to both data and functions can be filtered by user or by group. Read-only access can be stipulated on any document, for specific users or groups.

Length of time on the market, number of upgrades, and upgrade pricing policy

CTK was founded in 1997, by Kathryn Engelhardt-Cronk, a former United Way executive. Since the Fall of 2003, the core ODM software has gone through 3 major version upgrades, and numerous incremental enhancements. All upgrades are included in the contract.

Difference from other products on the market

The CI ODM was built by United Way professionals for United Way professionals. CTK has created an affordable product that meets rigorous security standards, offers the most flexible data management capabilities, and provides the most customizable reporting tools. CI ODM allows United Ways of any size to quickly and accurately track, manage, and report the data required for outcome measurement. Also, the CI ODM User Group encourages United Way customers to learn from each other and to influence ongoing software enhancements.

List of customers willing to discuss their experiences with the product

Yes

Cost of the product

Cost varies by United Way metro size and number of community partners. An organization will pay a one-time implementation fee, then a monthly and an annual fee for the remainder of the contract. Proposals provided upon request.

Web site URL

<http://www.communitytech.net>

Contact information

Scott Smith

1-866-857-4798

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Jessica Martinez, Director of Sales

1-877-441-2111

jmartinez@communitytech.net.

Product purpose and capabilities

a) DCAR™ is an online enterprise software that supports data collection and evaluation of grant programs and initiatives. DCAR™ is scalable and configurable to allow for clients to make changes, additions, or deletions without incurring additional costs. DCAR™ is geared to help organizations focus on collecting data, set up infrastructure for evaluation, and measure impact.

b)

- Online logic modeling/scope of work
- Online grants/contract management
- Online client tracking/case management
- Online survey
- Online reporting
- Custom reporting

Minimum and recommended computer requirements

The minimum requirements for a computer system with internet connection that access our site are:

- Pentium II with 128 Meg of memory
- Window 9x/Me/nt/2000/XP
- Internet Explorer 6.0+, Netscape 7.0+, or Mozilla/Firefox
- JavaScript must be enabled

Minimum requirements for a network server

N/A. Web-based system

Training options available

Training can be done in 3 ways. The first is with core United Way staff who will be the system administrators. The second will be a community training workshop with invited grantees. The third can be online training sessions with groups of grantees/administrators. Basic training is included in the configuration costs with some added travel costs if necessary. Additional training is available and cost will be based upon scope. A typical user grantee will need about 2-6 hours of training of the system, depending on level of access and use.

Technical support available

Technical support and software maintenance is included in the subscription cost. A standard 6 hours per month phone/email technical support is included with the subscription. In addition JMPT will host an online support web site for each client that will have: Frequently Asked Questions, Important Documents, Announcements, Discussion Forum.

Type and amount of modification possible

Our system is designed so that most modifications/changes can be done without professional assistance. This includes changes in demographic data, users, questions, reports, et al.

Different levels of access available for different users including read-only

Yes. DCAR™ follows HIPPA guidelines and different users access can be controlled via the Admin section.

Length of time on the market, number of upgrades, and upgrade pricing policy

DCAR™ has been in the market for 4 years and is currently in version 2. A new version is released every 18 months.

Difference from other products on the market

DCAR™'s careful and thoughtful design as well as AJW's commitment to customer satisfaction makes this the system of choice. DCAR™ was built with knowledge of the non profit world and understanding of outcomes and performance. DCAR™'s unique configuration is also one of the first to begin integrating functions into an enterprise type system.

List of customers willing to discuss their experiences with the product

Yes

Cost of the product

It is based upon number of grantees and amount of configuration required. A normal, moderate-sized organization with 25 grantees will pay \$2,500/month.

Web site URL

<http://www.jmpt.com/Default.asp>

Contact information

Vinay Patel

415.541.9088

vinay@jmpt.com

Product purpose and capabilities

eCFund is more than an outcomes collection and allocation management tool; eCFund helps manage your entire community investment process.

All information fundamental to agencies, programs, citizen review volunteers, outcomes reporting, allocations, and the community impact agenda is organized using a well-defined structure.

- Agency, program, and citizen review volunteer management
- Online outcomes measurement reporting and evaluation
- Align program outcomes to your community impact agenda
- Document and record progress towards your community impact agenda
- Online evaluation process for citizen review volunteers
- Facilitate communication between volunteers and agencies with the Question and Answer Forum
- Customizable forms by grant and investment process
- Distribution of news items and resource documents
- Ability to manage multiple grant and investment processes
- Multi-year allocation management
- Share valuable data with your collaborators
- Streamline administrative resource intensive tasks:
 - Site visit management
 - Meeting and event RSVP
 - Presentation management
- Easy-to-use customizable reporting, exporting and data analysis abilities

Minimum and recommended computer requirements

IE 6.0 or higher is recommended.

Minimum requirements for a network server

N/A

Training options available

Training is available via self-paced, online tutorials, accessible from the user support site. Customized online and/or onsite training may be purchased.

Technical support available

User support site, email and phone support.

Type and amount of modification possible

The system is extremely flexible and customizable; meeting the evolving needs of users. Technical experience is not necessary.

Different levels of access available for different users including read-only

Yes, users of the administrative site may have different levels of access to functionality and to data.

Length of time on the market, number of upgrades, and upgrade pricing policy

The initial version of eCFund was released in 2000. Version 2.0 was released in 2004. Maintenance and enhancement upgrades are released monthly and available to all users. Enhancement requests are submitted and prioritized by current users. There is no additional cost for approved enhancements.

Difference from other products on the market

eCFund is designed specifically for United Ways at all phases of the community impact movement. eCFund provides the optimum solution for United Ways that prefer to use their precious resources generating community involvement, rather than designing and implementing technical solutions. It can be implemented rapidly, while allowing for growth and change to meet the requirements of evolving processes.

List of customers willing to discuss their experiences with the product

Yes

Cost of the product

Cost of the software is by subscription based on usage. The subscription includes hosting, support and upgrades.

Web site URL

<http://www.seabrooks.com/content/solutions/ecfund.aspx>

Contact information

Don Gatlin, Customer Solutions Director

808.335.3200 x406

don@seabrooks.com

Product purpose and capabilities

Tapestry is a flexible and powerful community information system. Tapestry systems can be configured with one or more of its main modules: client intake, referral, case management, volunteer, donor and contributions, HMIS, disaster and emergency management, and more.

- Advanced searching: keywords, zip codes, phrases, mileage, self-guided questions
- Customized taxonomies, financial tracking, portal technology, directory printing
- 360 referral messaging, custom fields and page links, reporting tools- XML
- Secure servers-SSL 128 encryption, firewalls, 8 national Internet backbones
- Plus: outcome data, forums, calendars, knowledge base, and multilingual
- Plus: integrates with VisionLink's employment and education suites

Minimum and recommended computer requirements

Standard Web browser on a standard computer: PC or Mac. Dial-up, broadband, wireless and PDA access are all available. No plug-ins are required.

Minimum requirements for a network server

N/A. Web-based system. On-site servers are also available

Training options available

Depending on the size of the organization, the typically recommendation is 15-25 hours billed at \$100/hour. Sysop Training, Coordinator Training, Train the Trainer, Executive Strategic Training, and other services, such as readiness assessments are provided.

Technical support available

Phone and email helpdesk services are available during regular business hours M-F, 24x7. Paging services are available as well. Uptime record is 99.9% since 1997.

Type and amount of modification possible

Custom content options are virtually limitless. Tapestry can be configured and adapted with a community's own materials, taxonomies, locations, client types, custom fields, graphics and more to meet a community's specific needs now and in the future. Further, Tapestry's powerful site-builder lets you alter the structure of the entire system.

Tapestry's Portal Technology allows Tapestry modules to be seamlessly integrated into agency Websites, and our free Tapestry badge lets you distribute resource directory access points across your entire community.

Different levels of access available for different users including read-only

Yes, we have multiple individual and group security options. Modules and components can be assigned different security levels as you deem appropriate. Intake and case management systems come with up to 20 levels of data privacy or sharing options.

Length of time on the market, number of upgrades, and upgrade pricing policy

Tapestry was first deployed in 1997. Upgrades are released several times throughout the year. Major upgrades are released at least annually at no additional charge. Upgrades are included in our monthly support plans; upgrade details are prioritized by clients.

Difference from other products on the market

Tapestry offers the best of both worlds in data management—all of its modules are fully integrated, yet you can deploy the modules you need when you need them, and you can offer different modules to different users and agencies. Tapestry is the only system of its kind to offer two distinct client intake, referral and case management systems to meet different, yet simultaneous needs of community or state-wide systems. Data sets and record identifiers are pre-built for regional and statewide integration, assuring long-term expandability. Data connections can be easily built to connect with legacy systems.

List of customers willing to discuss their experiences with the product

Yes

Cost of the product

Call for an estimate.

Web site URL

www.visionlink.org/tapestry.htm

Contact information

303-402-0170 or 877-VSN-LINK

solutions@visionlink.org