United Way
of America

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what matters.™

Outcome Measurement Data Management Systems for Agencies

Independently and in collaboration with local United Ways, health and human service agencies across the country have been implementing program-level outcome measurement. As these efforts generate outcome information, agencies look for ways to store, analyze, report, and track outcome data over time. This report was developed to help them identify commercially available software to meet that need.

The products included in this report represent two options for tracking outcome information. The first section consists of software that users purchase and install on their computers or network server. The second section consists of Web-based software which is hosted off-site and available to users through the Internet. None of these products tracks only outcome information. They all perform a variety of functions related to program and/or agency management.

Vendors have provided 2-page descriptions of their products including capabilities, hardware requirements, training options, and costs. The descriptions were written to give a brief summary of each product. All have been updated as indicated by the date shown at the end of each description.

If you believe any of these products may be helpful for your program, please contact the vendor directly for further information. URLs in the reports are linked to the vendors' Websites. **UWA has not evaluated and does not endorse any of these products**.

This report is available to the public through UWA's Outcome Measurement Resource Network at www.unitedway.org/outcomes. Information from additional vendors is welcome. Contact Roger Wood at roger.wood@uwa.unitedway.org. Summaries are listed as follows:

LAN-BASED SOFTWARE

CAPTAIN Case Management System
LAN-based Version

CAP Systems, Inc.
3 Cabot Place
Stoughton, MA 02072

Product purpose and capabilities

CAPTAIN® is a fully integrated Windows Case Management System to provide intake, processing, assessment, eligibility determination, referral, and service delivery of unduplicated client and household demographic data. This is a system that provides for single entry of client and household demographic data from any location to apply for programs and services. The production of outcome measures is a major objective of the system by using data collected in the intake and service delivery processes to relate service goals and results to broader outcome measures defined by funding sources. User customization features allow each agency to define their programs and services to the system and define custom data fields and rules by program. The hierarchy under which the system operates can also allow a large grantee to run the system on a single server with discreet and secure service databases for each delegate agency and the ability to consolidate data at the highest level. The focus of CAPTAIN is to facilitate single point of client entry from any location and to utilize prior historical information to expedite client input. A single intake can result in multiple automatic electronic referrals that eliminate the need for multiple intakes.

- Networked or stand alone and ODBC database with data export facilities
- Central intake linked to all programs including specialized modules for major programs such as Child Care, Emergency Services, Energy Assistance, and Weatherization.
- Integration of payment related services with agency financial systems
- User defined screens, intake and risk assessment, ad hoc reporting, and agency hierarchy
- Database of external resource agencies
- Robust and complete flexible reporting
- Appointment scheduling module
- Complete tracking of all changes to client records
- Extensive progress notes throughout the system
- Automatic eligibility determination and inter program referrals
- Individual and household composition database with direct availability of historical data
- Highly secure and confidential for the most sensitive programs

Minimum and recommended computer requirements

Windows 2000 or higher
Pentium 4, 512 Meg RAM, 1 Gb disk

Minimum requirements for a network server

Dell Poweredge 1850 server or equivalent for 100 users, Windows 2000 Server License
3 Ghz CPU, 1 GB RAM, Dual 36 GB SCSI disk (RAID0), SCSI RAID Controller

Training options available

As much training as the customer wants but 2 –3 days on site at $800 pre day is the norm

Technical support available

Complete on-going maintenance, technical support, and full time Help Desk M-F 8 AM – 7 PM

Type and amount of modification possible

Users can add data elements, define edit and use rules, create custom assessments, reports, Ad Hoc Reporting, user defined Risk Assessment, user defined Outcome Measures, and all drop downs. Further customization involving software modifications is also available if desired.

Different levels of access available for different users including read-only
Each user must be authorized by a unique user Id to access the system and then for every screen and report and within screens their unique functionality authorization – add, change, delete, inquire.

Length of time on the market, number of upgrades, upgrade pricing policy
Our first system was released in 1978 and modified and migrated from main frames to minis to Windows with constantly increased functionality. There have been five major releases but normal upgrades are made incrementally and included in maintenance and support

Difference from other products on the market
Quality, experience, and service second to none. Our length of experience in human services plus cutting edge technology and a great emphasis on the highest level of service and responsiveness.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Sold under a one time unlimited user license plus monthly maintenance and support.

Website URL
www.capsystems.com

Contact information
Phone: 781-341-5440
E-mail: tmclaughlin@capsystems.com

Client Case Management System

JABR Software
23995 Bat Cave Road
Suite 300
San Antonio, TX 78266

Product purpose and capabilities

The Client Case Management system is an agency-based system focusing on outcomes for the client and rich demographic and activity information to satisfy grant-reporting requirements.

Client Case Management system includes the following user capabilities:

- Multi user up to 50 concurrent users per license
- Capable of functioning in the following modes:
  - Single user stand-alone
  - Local Area Network (LAN) and the appropriate security
  - Wide area network (WAN) Cyrix or Terminal Server
  - A published application on the World Wide Web, which will allow for IBM or Apple Macintosh systems.
- Tracks all client and family demographics
- Client and family activity tracking necessary for grant requirements
- Client and family case management information which is security compliant with most federal and standards bodies
- Client outcomes are tracked and reported
- Customizable screen field and tab layout controlled by the user
- Customized screens come as part of the package
- Standard customizable reporting using standard output, spreadsheet output, report e-mail capability and viewer capability.
- Ad-Hoc reporting capability which can be developed and customized by the user with the capability to control which users see particular customized reports.

Minimum and recommended computer requirements

Minimum requirements for the Client Case Management system are:

- Stand alone Machine: Pentium III CPU, 256 Meg of RAM 1 gig Hard drive
- Local Area Network: Workstations are the same as (a). Server must have 500 meg of ram and 10 gig hard drive as a minimum with Windows NT 40 (sp6) or higher. If the network is wireless the server must have a 1 gig ram minimum.
- Wide Area Network server must be Windows 2000 or higher with 2 gig of RAM and 40 gig hard drive.
- Access to the World Wide Web

Minimum requirements for a network server

See the previous answer

Training options available

Self-training is available and manuals are provided at no cost, or on-site training is available for $600.00 per day, plus expenses for 3 days with a maximum class of 15. If more than 15 are in the class an additional instructor will be provided at $300.00 per day, plus expenses.

Technical support available

Unlimited phone and e-mail support for the first year. After the first year, being current with a maintenance fee will continue with unlimited phone and e-mail support.

Type and amount of modification possible
There is limited user field modification with no professional assistance beyond system training. If the user chooses to purchase the source code there is unlimited modification possible, however professional assistance is required.

Different levels of access available for different users including read-only
The system has a complete user security package which is HIPAA compliant.

Length of time on the market, number of upgrades, and upgrade pricing
Eight plus years on the market, over the past 2 years there have been at least 8 upgrades. (These can be viewed on the web). The upgrade policy is controlled by the maintenance agreement.

Difference from other products on the market
The Client Management System conforms to the way you do business and is all inclusive as opposed to software that will only work for one funder or grant.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Depending on the site and the features it will range from $2000.00 to $20,000.00

Website URL
www.jabr.com

Contact information
Contact sales or technical support:
Phone: 210.651.3155
E-mail: duko@jabr.com

Client Track Software System

Shah Software, Inc.
PO Box 9445
Midland, TX 79708-9445

Product purpose and capabilities

Client Track Software System is used by agencies that are in the business of helping people. The system allows these agencies to track services provided to a client and to measure client progress using a system of scales. The system provides them with features for defining client goals and documenting progress. Outcomes can be registered when agencies are successful in achieving a goal.

The software system allows them to create and conduct client interviews. Client progress is assessed by measuring changes in client responses to questions. At all times agencies can track client services in current and previous program years so they can see what worked in the past and what did not. The software allows agencies to make informed decisions about which direction to take in their work with their clients. If an agency is spending federal funds in helping the clients under emergency services, the system allows that agency to track fund expenditures. The system comes with a number of pre-programmed reports including built-in report writers.

Highlights:

- Centralized Client Intake. Client intake is done only once per client and never again.
- Track client services in current year and also in previous program years.
- Define client goals and document progress notes as you work with the client on case management.
- Register 'Outcomes' when successful.
- Create and conduct client interviews.
- Measure client progress by measuring changes in client responses to questions.
- Track general contacts, telephone contacts, group services.
- Reporting includes demographics, unduplicated count reports, service log reports, outcome reports, and client progress reports. Customized reports can be obtained through built-in Report writers.

Minimum and recommended computer requirements

- Operating System – Windows 95, 98, 2000, 2003, XP (Windows 95 and up)
- CPU- Pentium 333 MHX or equivalent processor
- RAM – 64 MB
- Disk space – 10 MB for initial installation and approximately 25 MB for every 2000 clients

Minimum requirements for a network server

- Operating System – Novell, Windows NT, Windows 2000, Windows 2003
- CPU- Pentium 333 MHX or equivalent processor
- RAM – 256 MB
- Disk space – 10 MB for initial installation and approximately 25 MB for every 2000 clients

Training options available

Staff training is provided at your agency location. The cost of initial training is included with the purchase of the software system. Periodically we arrange workshops and cost to participate in one of our workshops is $150 per participant for a full day of training.

Technical support available
Unlimited toll free telephone support is provided. Upgrades are also included as a part of the annual maintenance and tech support. Upgrades are provided free under the annual maintenance agreement.

Type and amount of modification possible
The software system cannot be modified by the user. We periodically modify it to meet with changing requirements.

Different levels of access available for different users including read-only
There are various levels of access available.

Length of time on the market, number of upgrades, and upgrade pricing policy
Software was developed in 1994. The upgrades are provided free under the annual maintenance agreement.

Difference from other products on the market
The software system is very easy to operate and is extremely user friendly. It will work on variety of operating systems. Our tech support is excellent. We provide free updates that help us in having all our customers use the same software version. We have customers using our system for more than 10 years and they recommend the system even today.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Depends on number of user licenses the client needs for operation on multiple stations.

Website URL
www.shahsoftware.com

Contact information
Phone: 800.968.2748
E-mail: info@shahsoftware.com

cmTools, LAN Edition

CMA Technologies
635 Chapel Hill Road
Burlington, NC 27215

Product purpose and capabilities

cmTools keeps comprehensive family information, including:

- Central intake
- Case notes
- Family demographics
- Employment and income histories
- Service tracking
- Outcome tracking
- Depth of reporting for management, providers and funding organizations

Minimum and recommended computer requirements

- Windows 98 (2^{nd} edition) or above
- Pentium 4 (700 MHz or above)
- 256K RAM
- 50 MB disk storage

Minimum requirements for a network server

- Windows 98 through Windows 200x Server
- Pentium 4
- 512K RAM
- 100MB to 1GB

Training options available

Typically two days of on-site configuration and training at $700 per day plus expenses

Technical support available

Help desk support is available Monday thru Friday, 9:00 – 6:00, excluding major holidays.

Type and amount of modification possible

cmTools is highly configurable for local requirements. cmTools provides extensive user-defined drop-downs and user-defined fields. Unlimited reports are available through third-party report generators. An ad-hoc query capability is included.

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

Yes; user access is role based.

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

cmTools, LAN Edition was first released in 1998. Major upgrades are typically released annually. All upgrades and support are included in an annual software maintenance program.

Difference from other products on the market

cmTools, LAN Edition is a reasonably-priced solution in use by many agencies across the nation. It is extremely easy to use and optionally provides specialized program modules such as LIHEAP, weatherization and more.

List of customers will to discuss their experiences with the product

Yes

Cost of the product
Typical installation is around $5,600, which includes onsite installation/training and an annual software maintenance agreement.

Website URL
www.cmatechnologies.com/Products/Tools/index.htm

Contact information
Phone: 800.747.0906
E-mail: info@cmatechnologies.com

Member*Track*©
Software

Member Track, LLC
P.O. Box 106
Fox Island, WA 98333

Product purpose and capabilities

Member Track, LLC provides comprehensive and easy-to-use database solutions that will assist your agency in managing day-to-day operations, evaluating program effectiveness and providing accurate accountability to your community, United Way and other funders. Member*Track* Software© integrates client information, program and outcome measurement with fund development and marketing.   Member*Track* aligns with all non-profit agencies such as youth development agencies, service-oriented organizations, member organizations, senior centers, etc.

Participants
• Clients / Members
  Demographics
  Communications
• Volunteers / Staff
• Organizations
 	
Programs
• Schedule Programs
  Print Calendars
  Capacity / Wait List
• Participants
  Attendance
  Scanning Module
  Registration Forms
• Program Fees
  Billing Statements
• Site Rentals
	Outcome Measurement
	• Outcomes & Indicators
	• Pre/Post Survey Results
	• Success Stories
	• Statistical Reports
	  Duplicated Counts
	  Unduplicated Counts
	  By Demographics
	  Retention Reports
	• Service Hours
	• Customized Outcome Measurement Modules
		Fund Development
		• Donations
		• Pledges
		• Gifts in Kind
		• Acknowledgments
		• Event Planning
		• Grants
		• Product Sales
		
		Marketing
		• Marketing Groups
		• Mailing Labels
		• Group Emails

Minimum and recommended computer requirements

- Pentium processor with 128 MB of RAM or greater
- 100 MB of free disk space (varies by data storage)
- Windows 98 or greater
- Microsoft® Professional Office 2000 or greater

Minimum requirement for a network server

Same as above.

Training options available

Five hours of installation and initial training are included in the purchase price of the license, which is usually sufficient for the typical user. Additional training is available at our hourly rate, currently $65 per hour. On-site training is available at the hourly rate plus travel-related expenses.

Technical support available
Technical support is available for free the first 2 months and as part of the optional Annual Service Plan thereafter. Annual Service Plan, currently $300 per year, includes support via phone or email, free upgrades and discounted customization and training.

Type and amount of modification possible
- Flexible report menus allow the user to select multiple filters, optional print fields and sorting.
- Multiple user-defined fields.
- Unlimited number of programs and surveys may be set-up by the user.
- All drop-down fields are user-defined.
- Built with MS Access for compatibility with MS Office products. All reports and labels can be exported to excel.
- Custom reports can be designed to meet unique needs for an hourly fee.

Different levels of access available for different users including read-only
Available as a customization or can be done through network operating system.

Length of time on the market, number of upgrades, and upgrade pricing policy
MemberTrack has been serving United Way agencies since 1996. Two major versions have been released. Program enhancements are continuously developed based on user requests and made available to as part of our Annual Service Plan.

Difference from other products on the market
MemberTrack is one of the few products that integrates client and program tracking, outcome measurement, billing and fund development into one package. MemberTrack is top of the line in terms of its comprehensiveness, quality, user-friendly format and attractive pricing. We provide expertise and consulting services for each agency's unique United Way reporting needs and provide customization and analysis as needed.

List of customers willing to discuss their experience with the product
Yes

Cost of the product
- $1,750 - $3,550 licensing fee per site (depending on optional modules).
- $300 per year Annual Service Plan
- $65 per hour for customization and training
- $55 per hour for conversion of data into MemberTrack

Website URL
www.member-track.com

Contact Information
Jo Levesque
Phone: 253.549.4546
Fax: 253.549.4547
E-mail: membertrack@centurytel.net

NonprofitBooks OFFICE

B2P Commerce Corporation
445 W Erie, Suite 208
Chicago, IL

Product purpose and capabilities

NonprofitBooks Office is a complete, all-in-one capacity building solution: integrated donor management, fund accounting and impact measurement.

Impact Measurement
- Identify and set performance measures
- Communicate results
- Benchmark for best practices
- Track financial, management and programmatic metrics
- Establish accountability
- Monitor progress towards goals

Accounting
- FASB 116 & 117-compliant nonprofit reporting
- IRS Form 990 preparation
- Automated expense allocation
- Budgeting
- Grant Management

Donor Management
- Detailed donor contact and transaction management
- Flexible reporting
- Donor communication
- Donation reports
- Fundraising revenue results

Minimum and recommended computer requirements
- Minimum of 64 megabytes of RAM and minimum of 105 megabytes of free disk space
- 300 MHZ or higher processor
- Windows 98 SE/2000/XP
- 256 Color VGA or SVGA or higher resolution graphics capabilities
- Minimum 600x800 screen resolution required (1024x768 recommended)
- QuickBooks Pro 2003, Premier 2003 or Premier 2003: Accountant Edition or QuickBooks Pro 2004, Premier 2004 or Premier 2004: Accountant Edition
- Internet Explorer 5.5 SP2 or higher

Minimum requirements for a network server

Same as above, this is desktop software.

Training options available
- NonprofitBooks Office Training Manual: This thorough reference guide gives details and instruction on all components of NonprofitBooks Office including important nonprofit accounting essentials, report generation, transaction entry and more.
- The NonprofitBooks Self Study Training Products: Three versions are available that match the offerings of the B2P NonprofitBooks Applications.
- NonprofitBooks Office: Nonprofit Accounting, Donor Management, and Impact Measurement.

- Development Only: Donor Management and Impact Measurement
- Nonprofit Accounting Only: Nonprofit Accounting

Technical support available
Our annual support plan provides you with unlimited support for your NonprofitBooks™ software through a toll free number, 1-866-EASY-NPB (1-866-327-9672), Option 3. Support is available Monday through Friday 9a.m. to 5p.m. CDT. Support also includes free product version upgrades.

Type and amount of modification possible
Impact Measurements is a completely customizable product that allows an organization to create the programs, outcomes, benchmarks, and results they want to be able to report on. The set up is easy-to-use and can be completed with little to no professional assistance.

Different levels of access available for different users including read-only
The system can print out real time reports to provide information to anyone with out accessing the data entry interface.

Length of time on the market, number of upgrades, and upgrade pricing policy
OFFICE has been on the market for 3 years, there are annual version upgrades that are free with Premier Support.

Difference from other products on the market
This product is the first of its kind. There is currently no other desktop outcomes tracking tool available on the market. OFFICE is the most inexpensive complete software solution for small to medium nonprofits.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
$1299 Multi User License OFFICE
$299 1 Year of Premier Support

Website URL
www.nonprofitBooks.com

Contact information
Phone: 1.866.327.9672
E-mail: sales@nonprofitbooks.com

ORS – Outcomes Results System

Design Data Corporation
Suite 103, 1858 Charter Lane
Lancaster, PA 17601

Product purpose and capabilities

Outcomes Results System (ORS) was jointly developed by Human Services Planning Systems and Design Data Corporation for client and family management in human service agencies interested in outcome results management and accountability. ORS provides for complete agency reporting, either consolidated or by program as well as individual program-level reporting utilizing standardized outcome goals and goal achievement/indicator measures of major, moderate, some and none.

ORS will assist your agency to enter, store, analyze, report and track outcome data over time. You can easily create assessment forms, establish goal definitions with measurable indicators and outcomes and then perform client evaluations over time. ORS also provides demographic information for family characteristics components, individual characteristic components, client tracking components for service contacts and service hours rendered, pre-loaded code tables for demographic information and terminology requirements and the ability for the user to modify, delete or add new codes as reporting requirements change over time. Using the outcomes information and other reportable information from these reports makes it easy to assemble your annual report. ORS eliminates the need for manually tracking and consolidating information. ORS major components include:

- Pre-defined standardized ORS Dictionary with over 450 pre-defined human service problems and needs with goal achievement indicators and goal objectives relevant to most human service agencies.
- Community Delivery System with community indicators that let you link your standard dictionary outcome goals for complete reporting at the community level.
- Standardized Core Data Elements (demographics) most common for state and federal reporting requirements and client tracking needs.
- The capability to let each program print their own application form.
- Uniform Service Plan for documenting the outcome goals and results for every client and/or family being served with unduplicated counts.
- Use assessments for programs (youth programs, Head Starts, etc.) where multiple goals are simultaneously evaluated, from on one screen, and report by individual or program.
- CSBG and ROMA reporting capabilities.
- Includes the scales for determining family progress and movement related to five levels of functioning (thriving, self-sufficient, stable, vulnerable and in-crisis) with reports.
- Vouchers module to process & track assistance payments for LIHEAP, CSBG and other programs. Includes the ability to electronically export voucher transmittal reports to your vendors.
- Income and/or expense data may be entered & maintained for each family with the federal poverty level percentage calculated automatically.
- Over 140 query driven reports included to manage your agency and programs and to distribute to management and grant decision-makers.
- ORS Web Hosting Services is the ideal solution for agencies who wish to reduce the acquisition costs associated with costly IT infrastructure as well as those agencies with multiple sites.
- Import/export capabilities are now offered with ORS. You now have complete control of your import and export requirements.

Minimum and recommended computer requirements

Windows 98/ME/NT/2000/XP, 1.0 GHz Processor, 256 MB RAM, 40 MB hard disk space

Minimum requirements for a network server
Windows NT/2000/2003, 1.0 GHz Processor, 512 MB RAM, 40 MB hard disk space.

Training options available
Implementation assistance and staff training is available at $1,500.00/day plus expenses. This includes software installation assistance, set-up and configuration assistance, staff training on the writing of specific measurable outcome goals for clients and families, staff training on the use of all data elements, code tables and terminology used with the ORS system, staff training for routine data entry, data entry of outcome goal evaluations and report generation, and the data entry of vouchers and report generation. Telephone assistance for implementation and staff training is available at $150.00 per hour.

Technical support available
Annual technical support is available for $500.00 per year.

Type and amount of modification possible
ORS allows for customization of the data tables for agency and program specific information and also includes the ability to create user-defined tables in each of the family and individual databases.

Different levels of access available for different users including read-only
ORS allows agencies and programs to customize security and access levels. Group and individual user security options are available to assign or deny access to specific programs and tables (files) within the database. Access levels can be assigned for full access, read only or no access to assure that individual client goals, client evaluations, service hours and vouchers are seen only by those users assigned, but family and individual demographic data can be shared. All menu maintenance functions can be secured.

Length of time on the market, number of upgrades, and upgrade pricing policy
ORS has been on the market since 1997. With the release of ORS 6.5 (August 2004), a total of 5 major revisions and 10 minor revisions have been distributed. ORS 7.0 is in progress with a planned ship date of January 2005. There is a $1000 upgrade fee if the Annual Technical Support is current.

Difference form other products on the market
ORS is the only software that includes both a pre-defined standardized Dictionary of Outcome Goals & Goal Achievement Indicators and a Community Delivery Dictionary System with Community Achievement Indicators. ORS was developed specifically for Outcome Results Management, not as an after-thought to a billing system or client tracking system.

List of customers willing to discuss their experiences with the product
This reference list is available upon request.

Cost of the product
ORS Software License........................ $5000.00
Annual Technical Support..................... $500.00

ORS Web Hosting Services
Call for Pricing & Options

Website URL
www.ddco.com/ORS

Contact information
Phone: 717.295.9712 Fax: 717.295.9796
E-mail: ORS@ddco.com

Tailored, Outcome-Based Evaluation Software

Silhouette Software & Analysis, LLC
PO Box 2689
Gainesville, GA 30503

Product purpose and capabilities

Tailored, Outcome-Based Evaluation software uses the measures and indicators unique to your individual program or organization to track and evaluate its impact and opportunities for improvement. Capabilities:

- Tailored variables to track and evaluate only those indicators relevant to your program;
- Intuitive interface for quicker data entry and fewer errors;
- Ready-to-print forms from the database to simplify participant referral and other types of participant administration;
- Multiple export options that allow you to share some or all of your available data with a third party;
- Standard and flexible reporting applications to make the most of your data;
- Web access options to connect multiple sites and eliminate the need for computer upgrades to operate software.

Minimum and recommended computer requirements

	Minimum Requirements	Recommended
Operating system	Windows 95, 98, ME, NT, or 2000	Windows 98, ME, NT, or 2000
CPU	PIII 233	PIII500
RAM	64 MB	128 MB
Disk Space	20 MB	20 MB

Minimum requirement for a network server

	Network Requirements
Operating System	Windows 95, 98, ME, NT, or 2000
CPU	PIII 233
RAM	64 MB
Disk Space	20MB

Training options available

Since the software is developed for each organization with the input from those collecting, entering, and using the data, training is rarely needed. Training manuals are provided with the software, however, and on-site training is available at minimal cost.

Technical support available

Phone and e-mail support is provided.

Type and amount of modification possible

Silhouette Software & Analysis tailored software is designed to be easily modified as your organization or program changes. This ability to be modified plus the level of planning used to develop the software ensure that the software will remain viable over time. Further, changes made during the first 3 months are provided at no charge. Some modifications can be made with no professional assistance.

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

This option can be included in the software if needed.

Length of time on the market, number of upgrades, and upgrade pricing policy
Since SSA does not offer one particular software application but tailors each software package for an individual program or organization, each package has been on the market for a different amount of time. Upgrades are developed and released when a large number of changes are needed. The cost of these upgrades depends on the extent of the changes made.

Differences from other products on the market
SSA develops software and analysis specifically for your program or organization, which provides more relevant, accurate, and informative evaluations. Your evaluations reflect exactly what your program is working to accomplish using the latest technology. We also focuses heavily on how the data will be analyzed and used so that organizations do not experience "data overload" and the confusion that results from not knowing what to do with the information. Lastly, SSA provides excellent customer service.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
The cost varies depending on the:
- Number of variables and functionalities included in the software;
- Type of analysis/reporting chosen;
- Type of software access chosen (desktop vs. web access).

Website URL
www.silhouettesoftware.com

Contact information
Phone: 770.967.2725
E-mail: bcantrell@silhouettesoftware.com

WEB-BASED SOFTWARE

Athena Case Management Software

Athena Software
67 Forbes Avenue
Guelph, Ontario
Canada N1G 1G5

Product purpose and capabilities

Both Athena and Penelope by Athena Software are comprehensive, powerful and secure client/service information management applications that utilize leading edge architecture to help maximize an organization's client service, communications, information management, accountability and program planning and implementation. Athena's ability to create and manage outcome evaluations comes with comprehensive tutorials. With their ability to track, schedule, bill and report on the full range of an organization's service spectrum in a multi-user, multi-site environment, Athena solutions are suited for family service/counseling agencies, social work and mental health centers, health promotion organizations and employee assistance providers. Our solutions are scalable to meet your requirements and your budget.

Features include:

- Central scheduling at a glance – indirect activities, client appointments and group scheduling can be booked into a site-specific master schedule
- Integrated custom outcome evaluation tool
- Complex multi-payer/split rate billing features
- Complete range of clinical case, activity and program notes
- Flexibility: a wealth of user-defined fields and drop-down lists
- Custom case document creation utility
- Advanced file attachment features
- Brief service logging and wait list functions
- Five security levels that give varying access to client files, activities, reports, notes etc.
- Home pages – customized for each worker based on their security level – show each workers' case and client list, days' appointments, tasks/ internal email, and agency news along with quick links to creating appointments, browsing reference information, search functions, reports and scheduling information
- Analytical, statistical, financial, program, staff and client-related reports – including the ability to export the data to Excel, SPSS, SAS.

Minimum and recommended computer requirements

Minimum workstation specs: 64 megs of RAM P2 200mhz Windows 98 Second Edition Internet Explorer 5.5 + HDD requirements are negligible
Recommended workstation specs: 128 megs of RAM P2 400mhz Windows 2000/ XP Internet Explorer 6.x

Minimum requirements for a network server

Depends on the number of concurrent users, but for 15 users, minimum server specifications are 500 megs of ram / P3 800mhz / Windows 2000/ XP or Redhat Linux 7.3+ or Fedora 1.0 / 10 gig HDD.

Training options available

Four hours of on-site classroom-style training are included in the initial license with additional online or on-site training available at $75/hr. Users typically require only about 4 hours of training.

Technical support available
Technical support is available for free for the first 90 days and as part of optional support packages thereafter. Support services are available via toll-free telephone, email, pager, SSH remote access and via our online help support center.

Type and amount of modification possible
There are over 160 fields and user-configurable settings that allow authorized users to modify the system without professional assistance. Users without professional assistance may create an unlimited number of unique, custom outcome evaluation surveys or forms.

Different levels of access available for different users including read-only
There are 5 different security levels with a number of configurable security settings to restrict access as required.

Length of time market, number of upgrades, and upgrade pricing policy
Four years with quarterly updates/upgrades available to clients with valid support contracts.

Differences from other products on the market
Flexibility, simplicity, power, performance and responsive support. Our thin client solution enables users to customize it to meet their changing needs over time.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Athena can host a solution starting at $60 per month per user. Server software and license starts at $2500 for the server and $600 USD for each active concurrent user.

Website URL
www.athenasoftware.net

Contact information
Phone: 1.866.806.6014 (toll-free)
E-mail: info@athenasoftware.net

CAPTAIN Case Management System
Web-based Version

CAP Systems, Inc.
3 Cabot Place
Stoughton, MA 02072

Product purpose and capabilities

CAPTAIN® is a fully integrated Web based Windows Case Management System to provide intake, processing, assessment, eligibility determination, referral, and service delivery of unduplicated client and household demographic data. This is a system that provides for single entry of client and household demographic data from any location to apply for programs and services. The production of outcome measures is a major objective of the system by using data collected in the intake and service delivery processes to relate service goals and results to broader outcome measures defined by funding sources. User customization features allow each agency to define their programs and services to the system and define custom data fields and rules by program. The hierarchy under which the system operates can also allow a large grantee to run the system on a single server with discreet and secure service databases for each delegate agency and the ability to consolidate data at the highest level. The focus of CAPTAIN is to facilitate single point of client entry from any location and to utilize prior historical information to expedite client input. A single intake can result in multiple automatic electronic referrals that eliminate the need for multiple intakes

- CAP Systems hosted or user hosted with remote connectivity provided over the Web
- ODBC database with data export facilities
- Central intake linked to all programs including specialized modules for major programs such as Child Care, Emergency Services, Energy Assistance, and Weatherization.
- Integration of payment related services with agency financial systems
- User defined screens, intake and risk assessment, ad hoc reporting, and agency hierarchy
- Database of external resource agencies
- Robust and complete flexible reporting
- Appointment scheduling module
- Complete tracking of all changes to client records
- Extensive progress notes throughout the system
- Automatic eligibility determination and inter program referrals
- Individual and household composition database with direct availability of historical data
- Highly secure and confidential for the most sensitive programs

Minimum and recommended computer requirements

Windows 2000 or higher, Internet Explorer 5.0 or higher
Pentium 4, 512 Meg RAM, 1 Gb disk

Minimum requirements for a network server

Dell Poweredge 1850 server or equivalent for 100 users, Windows 2k Server License
3 Ghz CPU, 1 GB RAM, Dual 36 GB SCSI disk (RAID0), SCSI RAID Controller

Training options available

As much training as the customer wants but 2 –3 days on site at $800 pre day is the norm

Technical support available

Complete on-going maintenance, technical support, and full time Help Desk M-F 8 AM – 7 PM

Type and amount of modification possible
Users can add data elements, define edit and use rules, create custom assessments, reports, Ad Hoc Reporting, user defined Risk Assessment, user defined Outcome Measures, and all drop downs. Further customization involving software modifications is also available if desired.

Different levels of access available for different users including read-only
Each user must be authorized by a unique user Id to access the system and then for every screen and report and within screens their unique functionality authorization – add, change, delete, inquire.

Length of time on the market, number of upgrades, and upgrade pricing policy
Our first system was released in 1978 and modified and migrated from main frames to minis to Windows with constantly increased functionality. There have been five major releases but normal upgrades are made incrementally and included in maintenance and support

Differences from other products on the market
Quality, experience, and service second to none. Our length of experience in human services plus cutting edge technology and a great emphasis on the highest level of service and responsiveness.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Sold under a one time unlimited user license plus monthly maintenance and support for user hosted systems and a monthly fee for Web hosted customers.

Website URL
www.capsystems.com

Contact information
Phone: 781-341-5440
E-mail: tmclaughlin@capsystems.com

CitySpan ProviderÔ

CitySpan Solutions
2437 Durant Avenue, Suite 206
Berkeley, CA 94704

Product purpose and capabilities

CitySpan Provider™ is a Web-based system for tracking services to clients. The tool allows direct service providers to efficiently manage their data, streamlining tedious administrative tasks and increasing productivity.

With CitySpan Provider™, agencies are able to:

- Register participants and staff. The system tracks participant involvement in program activities and maintains records of demographic characteristics, contact information, risk factors and health conditions. The staff module records detailed information including demographics and hiring prerequisites, such as background checks and immunization histories.
- Manage service programs and track attendance. Users can manage a range of services for groups and individuals, including classes, tutoring sessions, and case-management visits. The system simplifies attendance taking with pre-printed daily rosters and online tools.
- Collaborate and share data. Provider's flexible web architecture allows organizations to collaborate and share data online. Multiple service locations can serve a common group of clients by managing data through a single database.
- Assess Outcomes. The system enables users to generate reports that help evaluate the effectiveness of different programs. Users can input test scores, grades, surveys, or other evaluation criteria onto a participant record thus allowing for various analyses that relate program elements – such as attendance – to performance.
- Run Statistical Reports. The reporting tool organizes data into reports for presentation to staff, administrators and funders. The system summarizes an array of service data including number of persons served, quantity of services provided, and average daily attendance. A custom query tool enables users to create unique queries and cross-tabulations.

Minimum and recommended computer requirements

Any computer that can access the Internet can use CitySpan Provider. We do recommend Internet Explorer browser 5.5 or higher for best performance.

Minimum requirements for network server

Not applicable; there are no minimum requirements.

Training options available

We offer training services tailored to our clients' requirements. We provide on-site training, phone-based training, and a train-the-trainer option. Typically, two hours of training is sufficient for new users to begin using the system.

Technical support available
We offer live support to our users, Monday through Friday, 9-5 (PT) via our toll-free help line. We also offer an electronic bulletin board where users can post questions or make recommendations.

Type and amount of modification possible
We configure our systems to each client's specification, incorporating our client's proprietary forms, reports, and business processes into the system we deliver. As client needs and objectives change, we adapt the system to meet those requirements. In addition, CitySpan Provider includes a custom field-creation tool so that users can define their own data fields for intake and reporting.

Different levels of access available for different users including read-only
Clients can establish unique permissions so that some users can collect and input data anywhere in the system, while others can access only the input forms they need. In addition, the system enables funders and the public to view program statistics and basic information, but not confidential data.

Length of time on the market, number of upgrades, and upgrade pricing policy
CitySpan Provider has been on the market since 1996 and has been continually upgraded since that time. Because our system is web-based, enhancements are pushed out to clients on a regular basis, and there is no additional charge for those improvements.

Difference from other products on the market
CitySpan offers a unique level of service and partnership. We understand an agency's data management needs will change as its programs grow and evolve. We've designed a system where change processes are assumed, affordable, and part of our ongoing partnership.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
CitySpan Provider is very affordable. Please contact us for information about cost.

Website URL
www.cityspan.com

Contact information
Jana Good, Marketing Director
Phone: 510-665-1700
E-mail: jana@cityspan.com

cmTools, Web Edition

CMA Technologies
635-H Chapel Hill Road
Burlington, NC 27215

Product purpose and capabilities
cmTools keeps comprehensive family information, including:
- Central intake
- Case notes
- Family demographics
- Employment and income histories
- Service tracking
- Outcome tracking
- Depth of reporting for management, providers and funding organizations.

Minimum and recommended computer requirements
- Windows 98 (2nd Edition) or above
- IE 6.0+ and an Internet connection

Minimum requirements for a network server
cmTools, Web Edition requires no internal servers, networks or IT support.

Training options available
Typically two days of onsite configuration and training at $700 per day plus expenses.

Technical support available
Help desk support is available Monday thru Friday, 9:00 – 6:00, excluding major holidays.

Type and amount of modification possible
cmTools is highly configurable for local requirements, provides extensive user-defined drop-downs and user-defined fields. User reports are available through third-party report generators.

Different levels of access available for different users including read-only
User access is role based.

Length of time on the market, number of upgrades, and upgrade pricing policy
cmTools, in general, was first released in 1998. The Web Edition was released in 2004. Major upgrades are typically released annually. All upgrades and support are included in the subscription fee.

Difference from other products on the market
cmTools is provided as a service, with a fixed monthly cost. It is scalable and affordable for one user or many. Eliminates all need for complex internal IT structures.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Base monthly single-user subscription is $198. Additional users can be added for an average of $29 per month. The subscription provides unlimited use and includes all support and software upgrades.

Website URL
cm.cmatechnologies.com

Contact information
Phone: 800-747-0906
E-mail: info@cmatechnologies.com

Efforts-to-Outcomes (ETO) SoftwareÔ

Social Solutions, Inc.
3500 Boston Street, Ste. 70
Baltimore, MD 21224

Product purpose and capabilities

ETO Software is an on-line, secure, customizable database built to track the client, staff, program, and organizational impact of human service organizations.

Capability Summary:

- Unlimited simultaneous access
- Track Work with Individuals and Families
- Auditable Record Sets
- Secure and Confidential
- Customizable Demographics
- Customizable Assessments
- Customizable Outcome Tracking
- Service Plan Management
- Class/Group Attendance
- Partner (volunteer, mentor, etc.) Management
- Over 120 Standard Crystal Reports®
- Queriable and Exportable data

Minimum and recommended computer requirements

ETO Software is a "thin-client" application that ONLY requires an Internet connected PC with Internet Explorer 5.5 or greater. For optimal response speed, we recommend DSL, cable modem, or T1 connectivity.

Minimum requirements for a network server

ETO Software is hosted in Social Solutions' server environment; therefore, there are no minimum network server requirements on the client-side.

Training options available

Training is offered by human service industry experts, many of whom are former instructors. Training includes administrative application set-up and integration as well as end-user training. Training is offered at the rate of $90 per hour. Training is offered in one-on-one, small group, workshop, and on-line configurations depending on the client's needs and interests. A typical end-user requires 1 hour of training to be proficient in the Software.

Technical support available

Social Solutions provides 24/7/365 software maintenance, security, back-up, and hosting support. Unlimited phone and on-line technical support is provided by Social Solutions' staff to all authorized users of ETO Software between the hours of 8am-8pm (EST) Monday-Thursday, and 8am-6pm on Friday.

Type and amount of modification possible
ETO Software is extensively customizable. All feeder tables, demographic fields, assessment tools, survey elements, and outcomes are customizable by authorized end-users without professional assistance.

Different levels of access available for different users including read-only
There are currently 10 distinct levels of access available in ETO Software, including read-only access.

Length of time on the market, number of upgrades, and upgrade pricing policy
ETO Software has been on the market since April, 2002. Upgrades and enhancements are publicized through our newsletter and released monthly. All standard upgrades are made available to authorized users at no additional charge. Clients can request custom modifications to ETO Software. Social Solutions offers capped estimates for all custom modification work and works to develop a mutually satisfactory timeline for deployment.

Difference from other products on the market
ETO Software is more affordable, more customizable, and better supported than other products on the market. ETO Software is also the only database on the market today that effectively relates staff effort to client, program, and organizational outcomes, providing real-time return on investment and impact analysis.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
ETO Software is available in three standard configurations:

	One time License Fee	Recommended Training and Implementation	Annual User Fees
Site License **for one organization	$6,000	24 hours @ $90/hr $2,160	$120 per user account per year
Enterprise License **for multiple organizations (i.e., collaborations, etc.)	$31,400	40 hours @ $90/hr $3,600	$120 per user account per year
Hosted Enterprise	**Contact Social Solutions**		$120 per user account per year

Website URL
www.socialsolutionsonline.com/eto.cfm

Contact information
Steve Butz, President
Phone: 1.866.732.3560
E-mail: Steve@socialsolutionsonline.com

Online Data Manager

Community TechKnowledge, Inc.
20800 Industrial Terrace
Austin, TX 78758

Product purpose and capabilities

Online Data Manager (ODM) is a HIPAA-compliant case management and collaborative database system designed to support the delivery of human services provided by most nonprofit organizations including:

- mental health
- substance abuse
- health access
- employment
- food shelves
- after school and camp programs
- juvenile/adult criminal justice programs
- community services of all kinds

Agencies can dictate what their system tracks and how it tracks it – defining the values for almost every field on every data-entry form, as well as developing reports to suit their preferences and the requirements of their funders.

- case management by individual, family or household referral
- intake/face sheets
- evaluations/assessments
- case notes/progress notes
- service delivery by unit or group
- output/outcome measurement and reporting
- goal setting and goal attainment
- other care-related areas as needed

Included with each of the products in the CTK Software Solutions Suite, are powerful reporting tools, including the Report Builder for developing reports, and the Report Center for accessing and filtering real-time data from those reports. Exporting data for use in other applications is also possible. The Report Builder makes reporting easy, secure and provides you with a variety of tools to create as many report templates as you need, export reports, and more.

Minimum and recommended computer requirements

The ODM, ODM Designer and Report Builder require users to have Internet connectivity and utilize Microsoft Internet Explorer 6.0. No other software is required for ODM operation. Recommended system configuration:

- Pentium processor (500mhz or higher)
Internet Explorer 6 Service Pack 1
64 MB of RAM
- Windows 2000
32 MB of RAM minimum
Windows XP
32 MB of RAM minimum
- Windows 98
16 MB of RAM minimum
Windows 98 Second Edition
16 MB of RAM minimum

Minimum requirements for a network server

Since the ODM is entirely Web-based, and supported by CTK, there are no network server requirements for the customer.

Training options available

CTK offers both on-site and online training engagements. Online training is included in the price of every ODM. On-site training is available for $900.00 per day (plus travel expenses). CTK also offers a two-day on-site training/consulting engagement for $3,500.00 all expenses included.

Technical support available
CTK provides monthly telephone consultation and tech support Monday through Friday, excluding federal holidays, from 9 AM to 5 PM Central Time (GMT for UK customers). Twenty-four hour support is also available.

Type and amount of modification possible
At the core of CTK's Software Solutions Suite is the ODM Designer, which is included with, and serves as the foundation for all of our products. The ODM Designer is a powerful non-technical user's tool for creating, editing, and maintaining any of CTK's data-management products. CTK uses the ODM Designer to initially build the majority of our customer's custom-configured data-management systems. Once their system is up and running, users are then trained on using the ODM Designer and empowered with the ability to make many ongoing changes and additions from there forward. With the ODM Designer users can:

- Define data categories
- Design and edit data-entry forms
- Customize the look and feel of the system

Different levels of access available for different users including read-only
The ODM provides the ability to define individual user and group access level permissions (read/write/edit/delete) to every aspect of the system, including defining record-level access to specific clients as needed.

Length of time on the market, number of upgrades, and upgrade pricing policy
The ODM has been commercially available for over four years and used by hundreds of nonprofit organizations around the US and in the UK. Major product upgrades are offered annually, with periodic minor upgrades released 1-2 times per year. In 2004, the product experienced a total of 3 upgrades. The cost of the upgrades is already included in the standard pricing, so all CTK customers are automatically entitled to new releases as they become available.

Difference from other products on the market
CTK offers the greatest flexibility of any case management/outcomes measurement product on the market, and at a very competitive rate. CTK staff consists of experienced health and human service professionals, as well as technology experts.

List of customers willing to discuss their experiences with the product
Yes, customer references are available.

Cost of the product
The cost of the system is primarily based on the annual operating budget of the customer. Additional pricing influencers are: number of clients and programs.

Website URL
http://www.communitytech.net/solutions/18/health-and-human-services

Contact information
Phone: 1.877.441.2111 (toll-free)
Jeff Hall, E-mail: jhall@communitytech.net
Jessica Martinez, E-mail: jmartinez@communitytech.net

Outcome Tracker

VistaShare, LLC
1251 Virginia Ave.
Harrisonburg, VA 22802

Product purpose and capabilities

Outcome Tracker helps nonprofit service providers to manage client demographics, services, and outcomes and to analyze this information for management and funder purposes. Additional constituents (such as volunteers, donors, and partners) can also be managed via the product. Features include:

- Highly configurable by the customer
  - Including demographics, services and outcomes to track
  - Track outcomes for any entity (clients, entire organization, etc.)
- Powerful query and crosstab reporting tool
  - Allows users to "slice and dice" any data in the database
  - Users can "drill down" to see the details
- Network aggregation
  - Powerful tools to create aggregate reports from a network of organizations or sites
- Manage contacts with volunteers, donors and other constituents
- Secure Web-based access with unlimited users

Minimum and recommended computer requirements

Outcome Tracker is Web-based, so a user only needs a browser and an Internet connection. Supported browsers are: Microsoft Internet Explorer 5.5 or higher, Netscape 6.1 or higher, Mozilla 0.9.7 or higher, and Firefox 0.9.2 or higher.

Minimum requirements for a network server

VistaShare hosts Outcome Tracker remotely. No customer server resources are required.

Training options available

As part of the initial setup fee, VistaShare provides six hours of remote training for a "core team" of users. The structured training follows a series of lessons in User Guides, which the users may print or view on-line. Training includes day-to-day use of the system, configuration, and report writing. Structured training lessons for an end-user take approximately 2 hours. Additional training is available remotely ($100/hour) on on-site ($1,200/day plus travel expenses).

Technical support available

Technical support resources include extensive on-line help and user guide resources, a user forum, e-mail support, and telephone support (9:00-5:00 EST). Support is included as part of the monthly subscription.

Type and amount of modification possible

Outcome Tracker was designed so that customers need no programming expertise to configure the system. Wizards walk a user through configuration processes, such as adding activities, demographics, outcomes, and dropdown list values.

Different levels of access available for different users including read-only
Outcome Tracker provides four levels of access, from Limited User to Administrator.

Length of time on the market, number of upgrades, and upgrade pricing policy
Outcome Tracker has been in use and on the market since 2001. Upgrades are provided as part of the monthly subscription fee. VistaShare uses a rolling upgrade model, which allows us to update the software as soon as each enhancement is complete and tested. Since VistaShare hosts the product, all customers can use the enhancement immediately.

Difference from other products on the market
- Aggregate reports across a network of organizations or sites
- Configurable without the need for a programmer
- Unlimited outcomes at the client or organization level
- Crosstab analysis and drilldown tools

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
Outcome Tracker has a setup fee (which includes an initial configuration plus 6 hours of training) and a monthly subscription. These fees are tiered according to the number of people an organization serves per year. Most organizations are between $2,800 - $5,400 for setup and $120 - $225 per month for unlimited user accounts. Additional fees apply for network aggregation tools.

Website URL
www.VistaShare.com

Contact information
Dave Smucker
Phone: 1-866-82-VISTA (866-828-4782)
E-mail: info@VistaShare.com

Tapestry

VisionLink, Inc.
4720 Table Mesa Drive
Boulder, CO 80305

Product purpose and capabilities

With the strength of finely woven fabric, Tapestry integrates all aspects of community needs, information, resources, and outcome management. Tapestry is about synergy—bringing together directories of resources, 2-1-1, Homeless Management, Emergency Preparation and Response, Volunteer and Donor management, and comprehensive single and multi-agency case management. It does so, however, in a completely modular, flexible approach so that you can deploy the components you need, when you need them, and only for the agencies which want them.

Tapestry is HIPAA, HMIS, ACID, and AIRS XML Data Exchange compliant. Tapestry will be fully ADA compliant first quarter of 2005.

- Community & Statewide Resource Directory
- 2-1-1 & Information and Referral
- Single & Multi-Agency Case Management
- Agency, Program & Service Descriptions
- Eligibility Assessments
- Completely Modular & Flexible
- Seamlessly Integrate with Your Web Site/s
- Non-Duplicating PIN Generator (patent pending)
- Mapping & Mileage Distance to Services
- Community Outcome Management
- Disaster Planning and Response
- Homeless & Shelter Management
- Volunteer Opportunities and Brokering
- Online Pledges, Credit Card Processing
- Student Support Services & Elder Care
- Online Expert Content Knowledge Bases
- Calendars, Messages, Threaded Forums
- Multi-Lingual Profiles & Taxonomies

Minimum and recommended computer requirements

Users need nothing but a Web Browser. We support dial-up, wireless, and high speed access.

Minimum requirements for a network server

Tapestry is deployed from VisionLink's professional and highly secure Application Service Provider facilities. There are no hardware or software requirements or charges whatsoever. (On-site servers can be provided, optionally, if requested.) Our uptime rate is 99.96% since 1997.

Training options available

VisionLink provides training for your system operator, your end users, your trainers, your decision makers and others as you deem appropriate. Training is approximately $100 an hour and can be provided at your location, in our offices, or by phone, web or video conference.

Technical support available
We provide 24x7x365 system monitoring, unlimited email and phone-based technical support, online help systems, free testing sites, full documentation, upgrade training and daily secure backups. Our 24-hour incident response *and resolution* rate is 90%.

Type and amount of modification possible
Tapestry is extraordinarily customizable—and well beyond custom fields. You can change the entire structure of the system, deploy different modules to different agencies simultaneously, integrate Tapestry's components with your own web sites, and much more. No programming skills required.

Different levels of access available for different users including read-only
Tapestry provides complete user, client, staff, agency, and group levels of access control.

Length of time on the market, number of upgrades, and upgrade pricing policy
Initial versions were being tested as early as 1997. We release major upgrades every year, with minor upgrades more frequently. There are no charges for upgrades, documentation or upgrade training.

Difference from other products on the market
Tapestry is built on the most advanced Unix/Linux, SQL, XML technology for speed and stability; it is the most flexible system; and it integrates all aspects of community needs, assets, and outcomes. Because of our investment in high-end technology, and because Tapestry is part of a much larger social services-education-workforce system by VisionLink, we can offer very low prices.

List of customers willing to discuss their expectations with the product
Our clients enjoy talking to prospective clients.

Cost of the product
As low as $350 per month for a regional partnership.

Website URL
http://www.visionlink.org/tapestry.htm

Contact information
Phone: 1-877-VSN-Link
E-mail: solutions@visionlink.org

TraxÒ

nFocus Software
6245 N 24th Parkway, Suite 100
Phoenix, AZ 85016

Product purpose and capabilities

Trax® is a fully integrated Web-based management system developed for nonprofit organizations and government agencies to successfully manage membership needs. Using bar-coded ID cards, the software collects time and attendance data. Trax® enables administrators to automatically generate accurate, statistical reports about facility usage and member demographics for the organization and their funders. Trax systems are used to track members, staff, volunteers and donors.

- Membership Management: Tracks demographics, attendance, fees, activities and outcome measurement. User-friendly web interface supports all levels of users.
- Survey Manager: Measure attitudes and behaviors. The only membership solution with integrated surveys and outcome measurement.
- Interactive: audibly greets each member, member-specific messages can be displayed on the computer monitor
- Active Stats: View active member statistics including member count, gender and ethnicity; quickly view past attendance of members
- Database Administration: The Administrator(s) can modify and customize Trax®.
- Reports: Over 120 standard reports (activity, time and attendance, fees, demographics, etc.). Create custom queries and reports for organization-specific information. Export formats: Word, Excel, Access, HTML, text and PDF.
- Exporting Data: Customer data is available to the customer upon request.

Minimum and recommended computer requirements

OS	RAM	HDD (avail)	Processor
Windows 2000	128MB	500 MB	1.0 GHz
Windows XP	256MB	500 MB	1.2 GHz

RS-232 Serial or USB with nFocus-approved serial adapter; Internet access (DSL, cable or ISDN) and Internet Explorer 5.5 or higher; administrative rights; AC power source for scanner.

Minimum requirements for a network server

The architecture of the system requires only client computers.

Training options available

$350 for one 90-minute Internet session and $1,500 for one 4-hour session at customer’s site or nFocus office. The Trax® owner chooses the 90-minute or 4-hour session, based on their requirements and experience. Individual user training is typically the responsibility of the organization’s trained Trax® administrator(s).

Technical support available

Our technical support team is available via phone, fax, e-mail or Internet Monday through Friday, 8:00 a.m. - 5:00 p.m. PST. Services include software set-up, user support, product troubleshooting, report assistance, etc.

Type and amount of modification possible
Trax® allows the user to add customer-specific information in an unlimited number of fields. Customized values allow accurate reflection of an organization's needs. Drop-down menus may be pre-set to ensure accuracy during data entry. Trax® reporting tools can be customized by the user to generate organization-specific reports. Customized reports are available (fee based).

Different levels of access available for different users including read-only
Our products allow administrators to create varying levels of user access including read-only.

Length of time on the market, number of upgrades, and upgrade pricing policy
Our product has been on the market since 1995. Automated feature enhancements are provided at no additional cost to current Annual Subscription and Support Agreement owners. The Trax® web based model supports feature enhancements without requiring IT resources from the organization.

Difference from other products on the market
Automated attendance tracking with electronic scanning devices, 120+ system generated reports, online survey creation and management, outcome measurement results, automated system enhancements, outstanding Technical Support and pro-active Customer Care. To increase productivity, add Staff Trax™, VolunteerTrax®, MoneyTrax® and/or DonorTrax®.

List of customers willing to discuss their experiences with the product
Yes

Cost of the product
The core Trax® product has a one-site/one-time set up charge of $2,250. Necessary scanning software/hardware is included. The $449 renewable Annual Subscription and Support Agreement includes data/application hosting, daily back-ups, unlimited technical support and automated feature upgrades.

Website URL
www.nfocus.com (select "Products" from left menu).

Contact information
Phone: 602-954-9557 (ask for Sales)
E-mail: sales@nfocus.com