

Using Technology To Enhance Delivery of Services

Trainer's Outline

Prepared for

nebhands *a faith-based and community initiative*

Funded by

Office of Community Services, Administration for Children and Families,
United States Department of Health and Human Services

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AGENDA

Welcome and Overview (45 minutes)

- Introductions and Icebreaker Activity
- Why is technology important?
- How can technology be used?
- Identifying current usage of technology

Action Learning (1 hour)

- Module 1: Data management

Break (15 minutes)

Module 2: Internet (1 hour)

- Module 3: Communication
- Module 4: Technology Plans

Review (30 minutes)

- Build Upon Today: More Learning Resources

Workshop Evaluation (15 minutes)

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Overview

Curriculum Delivery Guidelines:

The workshop curriculum has been created specifically for grassroots faith-based and community organizations that are providing services with limited resources such as full-time staff, technology, and/or funding. The workshop is designed to give the participants:

- A working knowledge of technology terminology as it relates to service delivery
- An understanding of data management and collection
- An understanding of how they can use the Internet to help them
- An understanding of what a technology plan is, and the basic process of creating and using one
- A set of resources to give participants a direction for further research and learning
- A working outline to take back to their work groups to apply to their real world programs

These topics are beyond the scope of this curriculum:

- How to use any specific software programs
- A completed technology plan



I. Introductions/Ice breaker:

- A. Introduce yourself and describe your experience
- B. Have each participant to briefly introduce themselves
- C. Form small groups of 5 people, and show them the icebreaker terms
Encourage them to make up answers if they don't know
- D. After 5 minutes, go through the answers on PowerPoint

Group Activity:
Define these terms

- ISP
- WWW
- WYSIWYG
- RAM
- SQL
- CPU
- HTML
- DSL
- CD-RW

Definitions

ISP: Internet Service Provider
WWW: World Wide Web
WYSIWYG: What You See Is What You Get
RAM: Random Access Memory, very fast, but temporary, storage for information in the computer
SQL: Structured Query Language, the standard language for accessing relational databases
CPU: Central Processing Unit, the "brain" of the computer
HTML: Hypertext Markup Language, creates web pages
DSL: Digital Subscriber Line, a fast Internet connection
CD-RW: Compact Disk-Reusable, CD's that can be used more than once

ISP: Internet Service Provider, a company you contract with for Internet service, such as Internet Nebraska or AOL

WWW - World Wide Web – the Internet

WYSIWYG ("What You See Is What You Get") - This term describes software that allows you to perform edits on a document that show you on screen exactly what will print out. Most word processing and desktop publishing programs now have this feature.

RAM: Random access memory, very fast, but temporary, storage for information in the computer. The more RAM you have, the faster your computer will run.

SQL: Structured Query Language, the standard language for accessing relational databases

CPU: Central Processing Unit, the "brain" of the computer that performs all of the calculations the computer needs to run

DSL: Digital Subscriber Line, a fast Internet connection through telephone lines

HTML: Hypertext markup language, the language used for creating web pages

CD-RW: Compact Disk-ReWriteable, CDs that can be used more than once



Why is technology important?

- Track essential information
- Making financial data tracking more efficient
- Documentation
- Consistency
- Outreach

II. Why is technology important?

How long would it take you to alphabetize a list of 400 people by last names?

How long would it take you to add a column of 100 three-digit numbers?

Why is technology important to your work?

You may also want to ask: Why isn't technology important?

Here are some examples of areas in which technology improves the delivery of services:

- a) Track essential data accurately, easier, faster and more consistently
 - Computers can count and tally information much quicker and more accurately than a person.
 - Data could be information such as financial, client demographics, or volunteer hours.
- b) Creating reports quicker; new reporting needs can be quickly answered
- c) Outreach to clients, volunteers, donors and the community
- d) Assessing needs of clients and programs
- e) Staff knowledge
- f) Collaborations

Technology is a tool to help you improve your services, provide services more efficiently, and collect data more accurately.



Ways Technology Can Be Used By Service Providers

- Data Management
 - Databases
 - Spreadsheets
- Internet
 - Grant research and applications
 - Finding best practices
 - On-line resource databases
- Communication
 - Email
 - Mailing lists/Discussion lists
 - Intra-organization networking

III. Ways Technology Can Be Used By Service Providers

A. Data Management

- a. Databases and Spreadsheets

B. Communication

- a. E-mail
- b. Mailing lists/Discussion lists
- c. Intra-organization networking

C. Communication

- a. Grant research and applications
- b. Finding best practices
- c. On-line resource databases

IV. Small Group Activity

A. *Have the small groups make lists, and then compile an overall list of each question. Categorize the answers into categories such as these:*

- a. Data management: Spreadsheets, database, tracking clients and donors, fiscal info
- b. Internet: grant research and applications, best practices research
- c. Communication: E-mail, mailing/discussion lists
- d. Other: Word processing, desktop publishing, appointment tracking, websites, etc.

While you are doing this activity, collect good examples that can be shared with the group and ask for details.

This scenario is one you can use if you can't get one or more participants to share their story.

- Ms. Eleanor—part-time coordinator at Good Faith Congregation
- Food distribution
- Workshop to link families with behavioral health services
- Has small amount of money for technology
- Has many questions
 - What is spreadsheet? What is database? Timesaving?

Discussion

1. How are you using computers now in your organization?
2. How could you use computers more?



Data Management

- What data is needed?
 - Financial
 - Participant demographics
 - Outcome data
 - Project planning information
 - Other grant requirements
- How to track information?
 - Database
 - Spreadsheets

Data considerations

- What data do you need?
- How much data will you collect?
- Will you collect 100 pieces of data about 10 people, or 10 pieces of data about 1000 people?
- What will you do with the data?
- Try to anticipate future needs

Spreadsheets

- A program for working with financial and other numerical data
- Budgets
- Actual income and expenses
- Basic data tracking (simple mailing lists)
- Examples: Microsoft Excel, Corel QuattroPro, Open Office Calc

V. Data Management

- A. What data is needed?
 - a. Financial
 - b. Participant demographics
 - c. Outcome data
 - d. Project planning information
 - e. Other grant requirements

VI. Data considerations

- A. What data do you need? -- Do you have requirements from your funder? Plans for future funding requests that will require data?
- B. How much data will you collect?
- C. Will you collect 100 pieces of data about 10 people, or 10 pieces of data about 1000 people?
- D. What will you do with the data? (reports, mailing labels, etc?)
- E. Try to anticipate future needs

Collect some examples from the participants of their current data collection and storage methods, and the things they see as needs.

VII. Spreadsheets

- A. General definition and examples of software
- B. Tracking of fiscal information
 - a. Creating a budget for grant application
 - b. Tracking expenditures
 - c. Creating fiscal reports



VIII. Sample Spreadsheet

Sample Spreadsheet

	January	February	March	April	May	June
Rent	\$100	\$100	\$100	\$100	\$100	\$100
Gas	\$75	\$75	\$75	\$45	\$30	\$25
Electric	\$75	\$75	\$10	\$45	\$55	\$40
Water	\$20	\$20	\$20	\$20	\$15	\$40
Car Insurance	\$50	\$50	\$50	\$50	\$50	\$50
Car Payments	\$221	\$221	\$221	\$221	\$221	\$221
Food	\$300	\$300	\$300	\$300	\$300	\$300
Entertainment	\$35	\$35	\$45	\$55	\$45	\$45
Total Expenses	\$1,250	\$1,250	\$1,214	\$1,107	\$1,221	\$1,271
Income	\$1,204	\$1,225	\$1,050	\$1,350	\$1,400	\$1,120
Difference	\$-44	\$-25	-\$14	\$243	\$179	\$-151

IX. Databases

Databases

- A program for tracking and manipulating data
- Can easily sort data, or extract data based on certain criteria
- Examples of software available: ebase, Raiser's Edge, Microsoft Access, FileMaker Pro

- A. General definition
 - a. Relationships, and sharing files
- B. Examples of software
 - a. Access
 - b. FileMaker
 - c. ebase

X. Database Examples

Database Examples

- Library catalog
 - Enter in criteria such as author name or book title
 - See list of potential matches with detailed information
 - See similar listings to book chosen
- Human Services
 - Specify the need
 - Narrow down by geographic area
 - Enter specific listings or greater detail for more information

- A. Library catalog
 - a. Enter in search terms such as author name or book title
 - b. See list of potential matches with detailed information
 - c. See similar listings to a particular book
- B. Local human service
 - a. A caseworker could quickly bring up a list of food resources by city, complete with income guidelines and hours of operation.

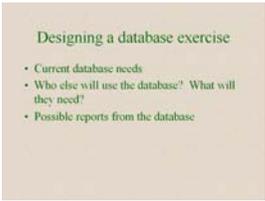
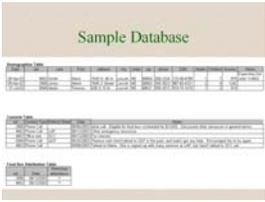
XI. Designing a Database

- A. Interview staff at many levels to determine needs
- B. Look at existing forms
- C. Look at current data collected and any systems that are already in place
- D. Determine type of data needed. Some possibilities are:
 - a. Donors—track gifts, dates, request dates
 - b. Clients—demographics, services received
 - c. Volunteers—dates of involvement, interests
 - d. Information and Referral—local resources

Designing a database

- Determine data needed
 - Donors
 - Clients
 - Volunteers
 - Information and referral
- Develop plan
 - Which data
 - Who will be responsible for entering and verifying accuracy





XII. Sample Database

XIII. Database Report Example

XIV. Group Activity: Designing a database

Scenario if no one has an example:

- Ms. Eleanor: Food box distribution database
- Plans with committee.
- Needs outcome data for congregation member/donor.
- Thinks about what data she needs, what data others need (secretary, etc.)

XV. Uses of the Internet

A. Research

- a. Search engines
- b. Foundation Center (fdncenter.org) – Comprehensive directory of grants.
- c. NTEN.org and TechSoup.Org
- d. And many more...

Ask the workshop participants about their Internet searching experiences.

XVI. Uses of the Internet: Grant Applications and Reporting

Many organizations are asking for on-line applications and reporting. You need to be comfortable with the Internet to compete with others. You can also use the Internet to communicate with your funders, which often results in faster replies.



Internet:
Information and Referrals

- On-line databases of local and national resources
- Articles, how-to worksheets, etc.

Communication

- E-mail (both internal and external)
- Mailing lists (for communicating with others in your field)
- In-house networking for sharing files

Multilingual Projects

- Computers are not yet able to translate
- Can type in a variety of languages
- As with interpreting, translators of written materials must be culturally sensitive
- Many multilingual resource web sites available

Additional options with technology

- Word processing
- Financial software
- Creating newsletters
- Creating a web site
- Tracking appointments
- Open source software
- Desktop Publishing

XVII. Uses of the Internet: Accessing on-line databases of community resources for client referrals

One example is the WorkResources.Org website that gives people in Lincoln and Lancaster counties help in finding the resources that they need to get and keep a job.

XVIII. Communication

- A. E-mail allows quick, easy, low-cost communication with co-workers, donors, funders, and community.
- B. E-mail based mailing lists
- C. In-house networking for sharing files

XIX. Multilingual Projects

- A. Direct translation not possible
- B. Can type in many different languages.
- C. Cultural sensitivity
- D. Web sites are starting to offer a variety of languages. (i.e. Social Security Administration)

XX. Additional options with technology

- A. Word processing
- B. Tracking appointments
- C. Desktop Publishing
- D. Financial software
- E. Creating a web site
- F. Open source software



XXI. Other Issues for Technology Use

A. Technology support staff/volunteers

With any technology usage, keep in mind how you will fix problems.

B. Training

- a. Mentoring
- b. Trainers
- c. On-line
- d. CD-ROMs
- e. Books

C. Recovery/Backups

Have a plan in place

D. Security

- a. Anti-virus and Firewalls

Other Issues for Technology Use

- Technology support staff/volunteers
- Training
 - Mentoring
 - Trainers
 - On-line
 - CD-ROMs
 - Books
- Recovery/Backups
- Security



Technology Planning

- What is a technology plan?
- Why create a technology plan?
- How is one created?
- What are the parts of the plan?
- How is it implemented?

Technology Planning

Ask the participants to share their experiences using technology in their agency.

If no good examples are forthcoming, this one can be used:

- A. Women's shelter
 - a. Five staff; three computers
 - b. Internet connection shared with fax machine
 - c. Wanted network and ability to connect to citywide database
 - d. Successful grant application for technology assistance

What is a technology plan?

It creates a roadmap for future technology purchases based on:

- The needs and wants of the organization and staff
- The overall goals and mission
- Projected funding
- Technical knowledge of staff

Why create a technology plan?

- a. To make a plan
- b. Correct problems
- c. Meet goals

Example: Women's shelter

- Didn't know what to do with existing equipment
- Didn't know how to save money in future

How is a technology plan created?

- a. Many guides are available on-line to create a technology plan.
- b. Involve staff.
- c. Do as much of the work as possible before bringing in a costly "expert".

Why create a technology plan?

- Save staff time and frustration
- Save money by buying less and fixing less technology
- Know what you need to request in grant applications

How is a tech plan created?

- Small committee with members from all parts of the organization
- Begin with overall mission and goals of organization
- Assess current technology
- Plan for the future



Women's shelter:

- a. Chose priorities first, learned basics of hardware and software they needed
- b. Then brought in a consultant

Final Steps

The most important sections need in the plan:

1. Current Technology
2. Goals
3. Action Plans with: Costs, Dates, Responsibilities
4. Budget

How is a technology plan implemented?

Keep your technology consultant up-to-date on your changes so that they will be familiar with your system whenever you need them.

Women's shelter:

- a. Consultant advised keeping computers,
- b. They began with Internet connections, networking, working with what they have

XXI. Group project: Beginning stages of technology planning

XXII. Review

- A. Summary of today's training
 - a. Data Management
 - b. Communication
 - c. Internet
 - d. Technology Planning

XXIII. Further learning

- A. See the appendix of the participants manual

If there is time, go through the manual with the participants and offer suggestions.



Technology Plans: Final Steps

- Create a written document detailing the current technology use, goals, an action plan, and a budget
- Begin implementing the plan as soon as possible
- Review and revise the plan as necessary

Technology Plans: Group Project



Review and Further Information

- Review of what you learned today
- Further materials and information