



Organizational Transformation through Technology At Public Allies

By Ann Goggins-Gregory, Joint MBA/MPA Candidate,
Northwestern University Kellogg School of Management and
Harvard University Kennedy School of Government

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For more information on Public Allies' technology and tools, contact: Dawn Hutchison, VP of Marketing and Development, Dawnh@publicallies.org, or Tahir Hassan, Director of Information Technology, tahirh@publicallies.org.



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Introduction

Public Allies advances diverse young leaders to strengthen communities, nonprofits, and civic participation. Their philosophy of leadership is grounded in five core values – collaboration, diversity and inclusion, asset-based community development, continuous learning, and integrity – that they believe are critical to uniting people and organizations, managing responsive and effective organizations, and increasing citizen participation, especially among those most under-represented and disengaged. Through their ten-month long AmeriCorps program which consists of full-time service at community-based organizations and intensive leadership development, they are building a network of *changemakers* – social entrepreneurs, servant leaders, and activists – committed to working long-term to build a more just and equitable society. Since 1992, over 1,500 diverse young leaders have participated in Public Allies' program in eleven communities.¹

From its inception, Public Allies (PA) has prided itself on its strong constituency of motivated, diverse, young adult leaders. Given PA's mission it is not surprising that throughout its history, the organization has been able to call on strong leaders in its constituency to expand capacity. Indeed, early on in its development, PA benefited from young, tech-savvy, entrepreneurial staff and Allies who served as early adopters, pioneering PA's new technology. Throughout the early 1990s, Public Allies took great pride in its ability to outpace its peers in the realm of technology, but then it fell behind.

Here begins PA's technology story. It is a story not unfamiliar to many organizations that have – at one point or another – found themselves losing what they once considered a competitive advantage. This is the story of an organization that leveraged its constituency and staff to bolster its technology, but that – due to significant growth without corresponding capacity expansion – found itself floundering several years later, far behind the curve without a clue how to catch up. This is the story of how an organization learned to follow its own advice and take an asset-based approach to transforming itself – in this case, technologically speaking.

Leveraging both internal and external resources, Public Allies built a state-of-the-art technology solution that transformed both its internal administration as well as program reach. As a result, over several years Public Allies reinvented itself by integrating technology into its strategic vision. Technology changes have saved PA tens of thousands of dollars, reduced the burden of paperwork processing for employees by thousands of hours, streamlined cumbersome systems and standards, and, most importantly, transformed the way PA conducts its daily operations.

The Basics of the Public Allies Program

Recruitment: Public Allies recruits young adults from diverse backgrounds with a long-term commitment to working for community and social change. About two-thirds of Allies are people of color, about 60% women, and about half college graduates. Allies are recruited primarily through grassroots efforts in each community.

Placement: Allies serve four days a week for ten months at community-based organizations where they create, improve, or expand services with measurable results. Placements range from small neighborhood development organizations to local affiliates of national groups like the Red Cross and Boys and Girls Clubs.

Team Service Projects: Teams of 7-10 Allies work on a project one-half day a week and overtime that helps a community organization expand services while the Allies learn how to work in diverse teams effectively.

Leadership Development: Allies participate in weekly trainings, dialogues, and critical reflections to build their self-awareness, knowledge of community, leadership values, and practical skills.

Continuous Learning and Assessment: Allies track their service outputs and outcomes through a web-based tool. Allies' leadership development is assessed and supported through Individual Development Plans, structured coaching, 360-degree reviews (by fellow Allies, Public Allies staff, and Placement supervisors), and other activities. At the end of the year, Allies participate in a Presentation of Learning, when they demonstrate how they have achieved Public Allies' leadership outcomes before their fellow Allies, PA staff, Placement staff, and other community leaders.

Alumni: Public Allies operates an alumni program that connects alumni with each other and with opportunities created by Public Allies and others to continue advancing their careers working for community and social change.

¹ To learn more, visit www.publicallies.org.



Public Allies' story highlights the potential for technology as a vehicle for organizational transformation. While PA's mission may be unique, its ability to revolutionize its operations through technology need not be. By telling its story and discussing prospects for replication, Public Allies hopes to inspire other nonprofits to look at their assets, develop a technology vision that supports the organization's mission, and embark on a process that can yield tremendous benefits to both the organization and its constituency.

In the Beginning...Ahead of the Curve

In the early 1990s, Public Allies compared its technology capabilities to its dozens of community partners and complimented itself for being far ahead of the technology curve. As an organization founded by young people in 1992, Public Allies had benefited from tech-savvy young staffers who embraced technology and who were excited about how technology could be used to build a stronger organization. Starting in 1993, entrepreneurial staff had created simple Apple Mac networks in each office that ran basic word processing, spreadsheet, and desktop publishing programs; when the organization received its first AOL account and 2400 Baud modems, it congratulated itself for adopting technology much faster than many of its partners and peers in the nonprofit sector who did not even have e-mail accounts.

However, by early 2000 it was clear that Public Allies was no longer a technology leader amongst its partners and peers. Computers donated to the organization in 1997 were getting slower and crashing regularly (out of 66 computers, only 13 were keepers and 29 were basically obsolete). Viruses struck often. The firm that provided their accounting software went out of business, so Public Allies had no access to technical support or upgrades. No one on staff was saving files on network servers or backing up information. Staff had little or no training on how to use basic applications effectively. Public Allies was spending over \$30,000 annually on internet service providers and email accounts for its ten offices. The website was static and outdated. During a period of rapid growth, PA fell far behind the technology curve as Public Allies opened new offices without an integrated technology plan for the organization or the internal capacity to support it.

Indeed, while PA had a strong reputation amongst its Partner Organizations (i.e. the organizations that host Allies during PA's 10-month leadership apprenticeship program) and continually provided a high-quality program to its participants, the organization's back office was struggling. The lack of coordinated, well-functioning technology led to a litany of major problems, the most salient of which were lower productivity, duplication of effort by sites and the national office, and increasing time spent on administrative tasks. With the growth of its program, it also was challenged to find effective mechanisms to monitor quality and report on the results of their Allies who served each year in almost 200 different community organizations.

An Effective Network

Each Public Allies site had its own computer network. While converting from Apple to PC-based networks in 1998, the organization set up only the most rudimentary networks in each office with no security, support, back-up, or standards. Each site had varying levels of volunteer or vendor support, and the organization probably had more music downloads than program data on its computers.

Tracking and Reporting Results

As AmeriCorps and other funders sought more rigorous reporting, Public Allies' uncoordinated, unstandardized, manual systems made such reporting very difficult. Operating with an antiquated paper-based evaluation system, Public Allies struggled to obtain timely results from over 200 Allies and placements each year; the national office dealt with long lags waiting for site data and then spent many weeks compiling incomplete results. Furthermore, it was challenging to convert programmatic data into a format that would be compatible with the AmeriCorps reporting system, WBRS. While Public Allies' knew that its program was of high quality – Partner Organizations testimonials and site data demonstrated this – tracking and packaging this data required weeks of preparation work by staff at the national and local



levels and was often incomplete and inconsistent from site to site. Whatever technology solution PA developed, an easy-to-use system for tracking and reporting on its results would be critical.

Constituent Communication

As a leadership development organization, Public Allies strived not only to develop young leaders, but also to serve as a role model for leadership amongst its key constituencies – Allies, Alumni, and Partner Organizations. To this end, PA realized in 2000 that it needed to bolster and improve its communications with these groups in order to foster its social change vision in its communities. In developing its technology plan, constituency communications would be a core piece of its strategy.

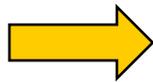
Falling Behind...Major Technology Challenges

As Public Allies fell behind the technology curve, its challenges could be attributed to a lack of standardization, integration, coordination, customization and security.

A lack of...

Resulting in...

Standardization: Public Allies had no standards for software, backup, maintenance, contracts, communication



- Poor staff communication
- System downtime –unclear which vendor would provider services and for what technology
- Regular loss of data due to system or computer crashes
- High costs – no economies of scale because each site made independent technology decisions
- The national office and at least three local sites had different websites with different look, language, etc.
- Incompatible software across sites
- Each site maintained its own contact databases with different software with many contacts outdated

Customization: Public Allies did not have effective tools to support its growing constituency and manage and report on its performance.



- Anecdotal information rather than data to manage and report on performance
- Large amounts of staff time spent manually compiling and aggregating results
- Incomplete, inaccurate, and untimely information and reporting
- No ability to provide distance learning opportunities, share documents and templates easily across the network
- Difficulty reaching, engaging, supporting, and connecting alumni across the network

Integration: Sites were not integrated onto one network; each site ran its own IT affairs with little/no national support



- Poor communication – national office and site networks could not “talk” to each other
- Limited or no integrated administration or data management, causing exorbitant paper-processing and staff time to integrate data across the network

Coordination: Local and long distance phone service, internet, etc were managed locally



- High costs – no economies of scale in org-wide services PA was paying \$30,000 for internet service and e-mail
- No coordinated technology administration
- High number of disconnects, high downtime, viruses

Security: Little to no standards for backup, virus protection



- Regular data loss
- Crippling computer viruses
- High costs for retrieving data



Responding to the Technology Challenges

Public Allies recognized that it needed to act immediately if it was to turn around its dysfunctional, ineffective technology systems. In response to these challenges, PA looked to Jason Scott, a tech-savvy board member, to assist in identifying its most pressing technology needs, which included: (1) upgraded hardware and software as the foundation for a strong organizational network, (2) new fiscal management software, (3) new fundraising/database software, (4) a new internet service and email provider, and (5) a new, more informative and interactive website. Understanding the importance of the impending technology facelift, PA included as a goal in its 2001 strategic plan “utilizing technology to improve our efficiency and effectiveness.” Paul Schmitz, Public Allies’ CEO, made technology a strategic priority for the organization and began to look for funders interested in PA’s technology initiatives.

Believing that grant monies earmarked for technology would fund the turnaround, Public Allies immediately began submitting proposals to develop a plan for creating a new technology platform, but the organization’s efforts were thwarted when securing financial resources proved far more difficult than expected. Many donors at the time either were fatigued with technology-specific grantmaking or were seeking to fund implementation, *not* planning. Meanwhile, PA did not have the financial resources to invest in technology, so hundreds of hours were being wasted on duplicative tasks, manual information processing, slow computers and slow connections. Potential donors were receiving outdated information on the web, the organization’s administrative costs continued to grow, and staff became increasingly frustrated with the lack of coordination and communication between sites and the national office.

Back at the drawing board, PA decided that even without committed funds, it was imperative that the organization start working on transforming its technology. Schmitz and Scott organized a technology advisory board of colleagues and friends in the tech industry that was tasked with leading PA’s technology scoping efforts. The technology advisory board began working in earnest to identify major problems and scope solutions, and several tech-savvy staff members joined in developing a technology vision that would support the wider organizational vision. Public Allies continued to search for interested funders, hoping to garner support and funding as it further developed a new vision for technology.

Cisco Systems and the Cisco Fellows

In February 2001, Public Allies met with Cisco Systems, presented them the organization’s technology challenges and dreams and asked for \$30,000 toward the cost of a staff person to facilitate the work of PA’s technology advisory board in creating a technology plan for PA. Cisco Systems said that while they would not fund the planning process, they were interested in PA’s technology process and might be interested in supporting the implementation.

An Attractive Proposition

Several months later Cisco called with a proposition: what if Cisco provided Public Allies with full-time technology staff for a year to create and begin implementing the technology plan? Cisco had recently launched its Cisco Fellows program and decided to offer Fellows to Public Allies based on PA’s strong reputation and positioning as an Americorps program.² Naturally, PA jumped at the opportunity and secured two Cisco Fellows at PA’s San Jose, California office.³ Arriving at Public Allies in the summer of 2001, the Fellows divided the tasks according to their areas of professional expertise. Mauricio Perez assumed the role of Chief Technology Officer (CTO), focusing on hardware and networking, while Marie Huang took on the role of Chief Information Officer (CIO), focusing on software applications and data management.

² Interview with Peter Tavernise, Senior Program Officer, Cisco Foundation. July 7, 2004. The Cisco Community Fellowship Program was launched in 2001 to “provide nonprofit organizations with much-needed technology tools, training and infrastructure.” (Cisco Fellows Report, 2003).

³ PA was also fortunate to have a third Cisco Fellow, Peter Tavernise, who had worked in Cisco’s corporate contributions department in Raleigh-Durham. Peter became Public Allies North Carolina’s Development Director and is now a Senior Program Officer at the Cisco Foundation.



Bridging Cultures

Interviews with the Cisco Fellows not only underscored the gaping technology differences between their large, for-profit employer and smaller, nonprofit Public Allies, but also reinforced the differences in culture between the Fortune 100 corporate culture of Cisco to the smaller, entrepreneurial, and colorful culture of Public Allies.⁴ The Fellows worked out of the Silicon Valley office – the site nearest their homes in the Bay Area – and upon arrival were given small amounts of money to purchase office furniture and paint for their office.

From day one, the differences in culture were clear to the Fellows, who spent the first several months learning about and adjusting to the Public Allies culture as well as doing an assessment of the state of technological affairs within the organization. They visited multiple sites, finding antiquated computers and paper-intensive systems (including a five page time sheet to track Ally service). From their site visits and assessments, the Cisco Fellows were able to gain a better perspective on PA's hardware and software needs. Just as the Cisco Fellows got to know Public Allies' culture, PA got to know Cisco's culture. By learning about the technological tools and systems Cisco used, Public Allies staff were able to envision technology solutions for Public Allies.

Given PA's expressed desire to improve communications to and among constituencies, and to reduce administrative burden from local/national staff, the Fellows created a technology plan focused on three areas: (1) network architecture of computers, servers, networking equipment, basic software and connectivity; (2) the online communications portal that would enable better communication among constituencies; and (3) the applications and tools that would help staff improve their management and operation of the PA programs.

The Fellows had grand visions for transforming PA's technology, but they were not accustomed to dealing with undefined, fluctuating budgets; Huang struggled to understand PA's mandate: "tell us what needs to be done and they'll write a grant to seek funds for it." Grant-writing as a means for funding projects was foreign to both of the Fellows, and they had difficulty at first developing recommendations that met Public Allies' definition of "cost effective." They also under-estimated the difficulty of securing donated goods. When the Fellows first presented their findings, PA senior staff was shocked at the suggested price tag. While PA did not dispute that implementing the recommended technology would save some costs, they stressed that regardless of the savings, the upfront cost (\$1,200,000) and annual maintenance (\$300,000) was far too expensive for the organization, and too difficult to raise.

While the Cisco Fellows had more experience working on networks for large businesses, the technology advisory board was made up of individuals who had founded enterprises and had built technology infrastructures cost-effectively from the bottom-up. What they found in Cisco's plan was that they had taken the infrastructure of a large company and tried to scale it down to PA rather than beginning at where PA was and thinking about how to scale technology up. The Cisco Fellows attempted to justify the costs through an analysis of return on investment that assumed that the efficiencies they would achieve with technology would increase people served and funds raised even though the nonprofit funding market does not operate like business. They also had overestimated what Public Allies would save through technology (e.g., they thought that technology would save PA \$100,000 in telecommunications costs as fewer calls, faxes, and conference calls were needed when PA's entire telecommunications budget was about \$70,000). While Public Allies would gain great value from technology (better, more timely information, less paperwork, and less staff burnout), costs for the organization would initially rise as the organization had its first technology budget (further savings would occur as the organization grew).

Key Lesson: *When receiving pro bono support from a large business, seek outside advisors with expertise and your organization's interests at heart to help you plan and evaluate their service. PA has engaged advisors in their work with other pro bono services as well. Paul Schmitz adds: "I'm so grateful for the pro bono help that I don't maximize the opportunity – I often don't know what to ask for, how to properly evaluate their plans, and how to get the most value from their service."*

⁴ Interview with Marie Huang, Cisco Fellow. July 7, 2004.



The Fellows revised their plan, incorporating feedback from the technology advisory board. The new plan relied much more heavily on outsourcing both development and maintenance of PA's technology systems, which further reduced the cost to a more reasonable level and brought a technology transformation a step closer.

In the process of working with PA, the Fellows learned to operate in a culture vastly different from the culture at Cisco; moreover, they ultimately embraced that culture and learned from Public Allies, just as PA had learned from them. In Cisco's Community Fellows Report, Marie commented: "[The Cisco Fellows Program] has given me the opportunity to work with a fantastic organization, while honing my technical and managerial skills. While I have been able to make some valuable contributions as a Fellow, I feel like I received so much more in return."⁵

Public Allies' "Lewis and Clark"

The Cisco Fellows have been described as the "Lewis and Clark" of PA's technology development.⁶ Huang and Perez played a critical role in assessing PA's technology, identifying challenges, and proposing solutions for a more strategic vision for technology. As the Fellows investigated PA's technology woes and made recommendations, PA staff learned a great deal about technology and its capabilities. The presence of Cisco Fellows at Public Allies enabled staff to learn more about technology as the plan unfolded. The Fellows showed PA staff examples of Internet portals and online applications which helped PA craft the vision for PA's web-based portal and applications, considered their most innovative, mission-strengthening technology solution. Once the vision was formed, Cisco Fellows helped identify vendors, developed the business case for technological change, and created a roll-out plan to help staff adapt to the new technologies.

During the tenure of the Cisco Fellows, Public Allies staff learned in parallel with the Fellows, both about technology and about the potential for collaboration between the for- and nonprofit sectors. The Fellows' technology experience helped PA form a vision and roadmap for implementation. Perhaps most importantly, the Cisco Fellows were able to identify new technology frontiers for Public Allies in a way that PA could never have done for itself. The Fellows opened up PA's view of technology and its capabilities and helped bring the organization back in line with the technology curve that, just a year earlier, had been far out of reach.

"Through the Cisco Fellows, we gained valuable insight into how corporations can and want to be involved with nonprofits."

David Weaver
VP, Leadership Development

Recipe for Success

2002 marked a turning point for Public Allies. Public Allies had completed a new five year strategic plan that sought to achieve four goals: (1) make PA the best leadership development model for diverse young people committed to working for change long-term, (2) expand to new communities, (3) mobilize and support its alumni network, and (4) raise the voice and profile of its network. Public Allies' technology plan complemented these strategies with three objectives: (a) improve management, foster more internal sharing and collaboration, and streamline administration; (b) improve their tracking and reporting of program results; and (c) improve communications to and among their constituents. To achieve these strategies, Public Allies would build an integrated, secure, and high speed national network with common software platforms, online applications to improve management, administration and reporting, an easy to update public website, and Internet portals for our various constituencies.

The combination of a committed staff, the Cisco Fellows, the technology advisory board and, ultimately, technology-specific grants allowed Public Allies to make a number of critical decisions. As PA developed its technology vision with the Cisco Fellows and its technology advisory board, it continued to apply for grants to fund implementation. In June, 2002, PA was one of five recipients of a Microsoft Technology

⁵ From "Cisco Community Fellowship Program Report," 2003. Profile of Marie Huang.

⁶ Interview with David Weaver, Public Allies' VP of Leadership Development, on July 1, 2004.



Leadership Grant for software at market value of \$200,500. Public Allies also received thousands of dollars in donated equipment from Cisco; without Cisco's networking hardware, little of Public Allies' technology solution would have been possible.

Equally important, by establishing a clear link between its strategic plan and technology's role in it, Public Allies was able to secure funding through programmatic grants for several critical positions that would support the implementation of the technology vision. For example, PA hired Claire Thompson, Director of Continuous Learning, from the United Way to establish a more robust outcome-based evaluation system. Working with an online application developer identified by Cisco, Thompson helped design a web-based application to track the service of every Ally across the country and to aggregate data for reporting. Public Allies also promoted Merilou Gonzales to Director of Alumni Relations to help connect and support alumni in their continued work for community and social change. She was able to work with the same developer to conceive of an Internet portal for our alumni network.

As the Cisco Fellows' twelve month term at Public Allies was coming to an end in June, 2002, PA hosted a tenth anniversary celebration for the organization that brought together 600 Allies and alumni from across the country. At the event, the Alumni portal was launched and PA's technology plan began the implementation phase. At an all-staff gathering six weeks later, PA had new staff implementing its strategic goals, leased a fleet of computers, secured new software for all of its computers, designed an integrated and secure network with higher speed connectivity for all offices, launched constituent portals and a new website, and was completing new online evaluation tools. By integrating these technology strategies, the organization brought its technology platform from antiquated to best-in-class.

National Office Technology Integration

By centralizing technology operations through the national office, Public Allies has achieved a 60% reduction in the number of vendor contracts it is managing, thereby drastically reducing its overhead costs and the headaches involved in managing contracts with varying lengths and service levels.

While Public Allies now has a higher technology budget, that budget incorporated savings from lower telecommunications, internet service, e-mail, copying, printing, personnel and travel costs. That budget has also benefited from improved management, increased productivity, and more results to share with donors. For every \$1 spent, PA estimates they have received a \$3.18 return.

Finally, Public Allies hired its first Director of Information Technology Services, Tahir Hassan. Upon arrival at PA in October, 2002, Hassan adapted the Cisco technology plan, making adjustments as necessary to accommodate the realities of PA's multiple sites. He then managed the implementation and roll-out of the solution to the organization. He sought better deals from vendors which cut costs and managed their outsourced contracts meticulously. Each component of Public Allies' resulting technology solution addresses one or more of the problems of integration, coordination, customization, standardization, and security.⁷ Equally important, Hassan states: "Technology is the vehicle which allows Public Allies to unite its otherwise decentralized culture."⁸

Transforming Program and Operations through Technology

The technology platform used by Public Allies has been adopted by staff, Partner Organizations, Allies, and alumni, and has played a role in virtually everything the organization does. Today PA has well-defined technology standards for software, hardware, maintenance and communications. The organization relies heavily on outsourced services, administration, and maintenance to remain cost effective and has consolidated vendors. "I have worked in the technology field for over 14 years, and this is by far the most cost-effective technology operation I have ever seen," says Hassan, who adds that PA's technology operations are also once again far ahead of peers' technology plans.

⁷ Public Allies' technology solution is outlined in detail in the appendix.

⁸ Interview with Tahir Hassan, June 30, 2004.



Core Components of the Technology Solution

Some pieces of the technology solution directly reinforce PA's mission, others serve as a strong backbone from which the organization runs its operations locally and nationally. Appendix A provides more detail on their technology products, services, systems, and costs. Key components of the technology solution include the following:

A strong network: Public Allies' network serves as the backbone of communications, connectivity, and data management for the organization. Having consolidated sites into one central network, PA is now able to manage its data and communication effortlessly with centralized file sharing and storage, maintenance and security, and support. Public Allies has a contract for network printers that are also copiers, fax machines, and scanners (including the ability to scan documents into e-mailed pdfs) along with the support for all offices. All telecommunications and internet services are coordinated out of the national office as well; there is virtually no need for local management of these contracts. Finally, Public Allies now has excellent network security, including a firewall, constantly updated virus protection, and regular data backup and storage (laptops are automatically backed up every time they plug into the network). Importantly, Public Allies also created technology policies that all employees must sign that are enforced to ensure that the network is used and maintained appropriately. But more than all of this, PA has a technology solution that supports program management while enforcing accountability, logistical coordination, strong collaboration, and accuracy of information across the network.

Centrally managed contracts and vendor management: "Good vendor management has been one of the key success factors for Public Allies' IT," states Hassan, who underscores the cost effectiveness of centrally managed, long term contracts, with strong service level agreements (SLAs). Public Allies has outsourced its computer support, network security, maintenance, and web development and hosting services. In addition, PA centralized contracts for telecommunications, connectivity, printer/copier/scanners, and other items. PA conducts extensive due diligence in choosing technology vendors and regularly benchmarks its IT services and administration against its peers.

Portals for PA's Constituencies: The publicallies.net Intranet contains four separate communities that have access to different sets of data. Each portal contains a searchable Directory of the network, a Resources page that organizes articles and web-links by fields of work and issues relevant to their network, a Discussions area that allows people to form chat rooms and list-serves, a News page and an Events calendar. Allies and Partners may only see information created by Allies and Partners. When posting information, staff may check off which groups can see it – Allies, Alumni, Partners and/or Staff. In addition, the portal has areas specific to each constituency:

- **Allies:** The PISD system allows Allies to input their information and track their service and learning toward their annual outcomes and objectives. They input their time, accomplishments related to their outcomes and objectives, output data, stories of success, and share what they learned during the week. In addition, 360-degree reviews of Allies by their peers, Partner Organization supervisor and PA staff are conducted twice annually through the PISD. Allies may also search for each other, share resources, and chat with each other through the portal. When they graduate, their profile transfers to the alumni portal.
- **Partners:** Partner Organization supervisors are able to share information with each other, learn about the Public Allies program, and approve Ally PISD information and see Ally results to date.
- **Alumni:** Alumni have a section on Opportunities that posts jobs, scholarships, fellowships, and board opportunities that are searchable by location and issue area or field. Public Allies network members may post information and outside groups may post items through the front page of our www.publicallies.org website. In addition, there is an Action section that allows alumni to promote collaborative action – service projects, programs, or political action – and send automated emails to all alumni by issue interests they identified in their profiles or location (alumni may select in their profiles whether they want such e-mails related to their issue interests).



- **Staff:** Staff have access to all information on the portals and have other features as well. Staff have the PISD reporting module, which allows staff to track and aggregate data from the Allies. Staff have a Program area that contains narrative descriptions of the baselines, standards, and methods of the PA program, contains best practices and templates for program documents and forms, and web links to useful resources. There is also an HR section that contains employee manuals, policies, forms (reimbursements, Personal Time Off requests, etc.), and links to all benefit providers and pdfs of benefit manuals and forms. Employees also complete online timesheets. Finally, there is a Development and Communication area that includes policies, logos, templates and documents, links to news articles and other items for staff.

Achieving Organizational Strategy through Technology

Case in Point: PA's Alumni Relations

The Alumni portal has been especially important for helping the organization connect and communicate to its graduates. Having gathered considerable feedback from alumni, Allies, and staff, PA scoped a technology portal that facilitates communications to and amongst its growing alumni group. Says Peter Tavernise of the Cisco Foundation: "Public Allies' alumni portal is robust with content and highly interactive...everything about the portal makes it a best practice."¹

THEN: Public Allies has always recognized the great potential of its continually expanding alumni network to create a national leadership movement. But before the development of the PublicAllies.net alumni portal, harnessing that potential presented a challenge. Alumni engagement took place largely at the local level, and alumni lacked a strong sense of connection to the national network. Because of the great distance between Public Allies sites, it was difficult for alumni to form connections with alumni from sites other than their own. There was also no central way for PA to communicate to alumni about opportunities for their continued development.

NOW: The use of online technology has enabled Public Allies to connect alumni across the country and strengthen the identity of Public Allies as a national leadership movement. Using the PublicAllies.net alumni portal, alumni can form connections with alumni from other sites and capitalize on the assets of a national network of over 1,500 diverse young leaders. The portal serves as the hub of the alumni network and provides a variety of ways for alumni to communicate, collaborate, and share resources, even if they live thousands of miles from each other. The portal is essential for Public Allies to achieve its mission as a leadership development organization with a growing nation-wide network.

Case in Point: Quality Management and AmeriCorps Reporting

Broadly speaking, Public Allies' Personal Impact and Service Documentation (PISD) serves as Public Allies' performance evaluation and tracking system, allowing Allies and Partner Organizations to report on performance, outcomes, and progress, while at the same time allowing staff to track individual and site performance. The PISD is essentially an expanded, results-based timesheet, in which Allies input the results of their service each week in relation to their annual outcomes and objectives, report on other output measures like volunteers recruited, and report on their own development and service success stories. Once the Ally completes their PISD, it goes to their Partner Organization supervisor who has to approve it and then their Public Allies Program Manager who also approves it. Once all the approvals are gained, the data goes into a Report Generation Module that allows staff to track and aggregate results on a variety of outcome, output, and statistical measures. Because PISD technology specifications map directly to AmeriCorps reporting needs, PA is better positioned than many of its peer organizations to provide up-to-the-minute, accurate reports to AmeriCorps and other funders as well. Leaders at AmeriCorps have recognized the PISD system as an excellent example of reporting technology.

THEN: Before 2002, Public Allies used archaic program implementation and evaluation systems. Most of the key mechanisms of the program – tracking participant objectives, assessing output and outcome achievement, verifying participant service hour completion, administering 360-degree performance



assessments, etc – were managed using paper-based systems. The aggregation and synthesis of participant and program performance, as well as reporting and communication of results, were all done manually. PA knew the program worked well, but administration was arduous and analysis and reporting even tougher.

NOW: The online PISD system tracks, synthesizes, aggregates data and develops reports on outcomes. Program analysis can be done at any time by ordering customized data from the online portal. PA's new systems allow the organization to share best practices nationally, while being able to retrieve the most vital output and outcome data in real time. It has helped PA's ability to uphold high quality standards, regulate program performance and communicate impact to stakeholders.

How Public Allies Succeeded

It is with the tremendous support of internal and external human resources, a dedicated board, and committed funding that PA was able to implement its technology solution successfully. Moreover, several key strategic decisions proved critical in improving PA's operations through technology. These include:

- **Pro Bono Consulting and Volunteer Advising:** Public Allies would not have successfully completed this process without the support of Cisco Fellows and its Technology Advisory Board. By utilizing both, PA was able to create a better plan and maximize the resources available from Cisco and other groups.
- **Supporting organizational strategy:** By integrating technology into the strategic planning process, Public Allies developed a technology vision that keeps organizational strategy at the forefront of technology planning at all times. Utilizing technology allows PA to achieve more.
- **Developing integrated, customized systems:** By integrating all technology systems across the network, PA has enabled a network that is strong, stable, cost effective, and highly communicative, both with constituents and internal staff. By creating and adapting tools for its specific needs, systems, and constituencies, PA's technology was adapted to the organization rather than adapting PA to technologies and tools created for others.
- **Central management and outsourcing:** By consolidating vendors and outsourcing much of its technology support, PA has been able to maintain a one person IT staff to focus on planning, research, strategy, and contract management. PA relies on vendors for cost-effective implementation and gains from what the vendors learn and learn to do faster from other clients.
- **Enforcing clear standards across the organization:** Helping employees adapt to a technology-driven environment – especially a grass-roots technology-driven environment – can be challenging. Establishing and enforcing clear standards are critical. All employees sign a technology use policy, and web-based trainings and other forums are used to help staff utilize tools effectively.

Prospects for Replication

Public Allies' technology story has broad implications for replication, particularly amongst small to medium-sized nonprofits that have very limited IT staff and budgets and organizations with rigorous grant reporting requirements. Replication prospects can be viewed on a number of dimensions, the most salient of which are cost-effective network development and support, outcome-based reporting for AmeriCorps and other grant programs, and building online communities with groups such as program alumni. Appendix A is Public Allies' technology plan and Appendix B is a detailed description of the technology systems and tools Public Allies uses and their costs.

Public Allies never had a technology budget, had no technology staff, and had no idea how they would secure funds to build new networks and tools. When PA looked at what they were spending on copying, printing, internet service, e-mail service, telecommunications, however, they recognized that there was indeed a budget. When they added the inevitable costs for new equipment or repairs that were rarely budgeted, there was even more. While Information technology increased their budget in the short-term, the value they gained was worth it. Schmitz adds: "It felt pretty risky to commit to increased spending on technology, but the investment paid off incredibly well. The value we gained was not as captured in the



savings of actual dollars, but in the increased information, communication, and productivity that has made us a better organization – one better positioned for programmatic and financial success.”

In cash, Public Allies spends about \$155,800 each year on 1 FTE, outsourced network and support services, web hosting, online applications, web upgrades, computer leases, and connectivity. *This is for an 11 office network of 60+ employees using a lot of tools, so a smaller organization with effective outsourcing could spend a fraction of this.* Despite increased costs, we project our “return on investment” (costs saved, staff time saved, and cost to add same value without our tools) at \$495,240 (\$3.18).⁹

For AmeriCorps programs in particular, web-based evaluation tools can be helpful. Public Allies developed its online evaluation tools to integrate with and build upon AmeriCorps’ web-based reporting system. By developing the tool with a company that also hosts the tool and databases, Public Allies developed a system that is cost-effective and easily replicable. Cisco Systems has also supported other AmeriCorps-funded programs and has spearheaded an effort for AmeriCorps programs to share best practices and discuss how to disseminate cutting-edge technology to other AmeriCorps programs and help AmeriCorps improve its web-based tools and their integration with programs’ web-based tools. Ideally, Public Allies PISD data will automatically enter into AmeriCorps’ WBRs reporting system. “The network convened by Cisco has been great for exchanging ideas, and hopefully our work will open the door to other small and mid-sized AmeriCorps organizations,” says Tahir Hassan.¹⁰

For leadership development programs as well as AmeriCorps programs, the alumni portal is also a relatively low-cost solution that can help groups communicate with their alumni and help their alumni communicate with each others. The “Action” section is particularly a compelling tool since it allows alumni to communicate with all other alumni based on their shared issue interests, field of work, and/or location. Because Allies now use the portal during the program to track their results and have sections similar to the alumni portal, using it is a habit by the time they graduate.

Conclusion

A core value of Public Allies’ leadership model is Asset-Based Community Development. The approach, as the name suggests, focuses on identifying a community’s assets (e.g., the skills and talents of people and the social networks that exist) rather than focusing on its shortcomings as a means for solving difficult problems. Ironically, Public Allies initially looked at what it lacked – money – as the only means to address its technology woes. It was only when technology funds proved difficult to secure that Public Allies began concentrating on its assets instead. In so doing, the organization identified a host of resources at its disposal that would play a key role in transforming technology. Indeed, a committed senior management team, a strong technology advisory board, and a motivated, tech-savvy constituency provided an excellent springboard for PA’s technology transformation. From this strong base, PA was able to identify gaps in internal capabilities, which were filled in by Cisco Fellows and new hires. The convergence of organizational strategy, internal assets, external guidance in the form of both Cisco Fellows and, ultimately, tech-specific funding/in-kind donations, allowed PA to achieve its new vision for technology and reassume its position ahead of the technology curve.

Acknowledgements

Public Allies wishes to thank Cisco Systems and Microsoft for the donations that made our technology solutions possible. Specifically, we want to thank Mike Yutzenka, Peter Tavernise, Mauricio Perez, and Marie Huang at Cisco and Jack Krumholtz at Microsoft. We also want to thank Sheila Bernus-Dowd for getting us started and Josh Dorf, Magda Escobar, Nick Gleason, Bill Morris, Matthew Nelson, Buck Owen, Mark Perlson, Jason Scott, Ben Spero, David Steuer, and Joe Sallmann for their advice and help.

⁹ Public Allies’ technology tools have cut operating costs (isp, e-mail, printing, copying, telecom, etc.) by \$54,000, and saved \$197,640 of local program staff time (15%). It would require at least 4 FTEs (\$219,600) in their program and alumni departments, and \$24,000 in training and travel costs to get the added program, staff development, and alumni benefits received.

¹⁰ Interview with Tahir Hassan, August 12, 2004.



APPENDIX A: A RECIPE FOR REPLICATION

By Paul Schmitz, President & CEO of Public Allies, and Tahir Hassan, Director of Information Technology Services, Public Allies.

While sharing in this case study how Public Allies created a technology solution, we thought it also important to share the “what” in detail. We are not suggesting that our technology products or solutions are right for everyone and we cannot guarantee that the prices we paid are still accurate. Where vendors are mentioned, we are neither endorsing the vendor nor encouraging groups to patronize their businesses. We hope, however, that this can give organizations an idea of what kinds of products and systems we have purchased and how much they cost – knowing such things could have saved Public Allies a lot of time and money as we began our technology transformation. Keep in mind that Public Allies has 60+ workstations in 11 offices connected together. *If your organization has other best practices or has learned more effective or less expensive ways to achieve some of the same solutions, please let us know as we are always seeking to improve!*

1. A PLAN

It is important to create a technology plan. Spend time with businesses looking at their online tools and technology use. Look at the processes in your organization that seem most inefficient and your strategies for growth and consider how technology tools could support your strategic goals. We conducted an analysis of the cost-ownership tradeoff over a 3-5 year time horizon and fundraising feasibility analysis (What’s the value of owning, buying, outsourcing, etc.? Can we raise enough funds now or should it be spread out?). It is important to map out a plan that includes all of your current needs and identifies the sequence of steps needed to implement technology solutions over time. Finally, the organization’s leadership must be committed to this work, and someone must manage it – in a larger or more complex organization, a skilled IT expert on staff is essential.



2. NETWORK ARCHITECTURE

The network architecture is the backbone and hub of your system – it connects your technology together and to the outside world.

A. National Office

Router and Switch: The National office hub is set up with a Cisco 3600 Router (retail about \$3,500) and a 2950 Switch (retail about \$350). These allow Public Allies to have more power in the transmission of information among our 11 offices. To learn about Cisco’s giving, go to: http://www.cisco.com/en/US/about/ac48/about_cisco_community_and_philanthropy_home.html.

Connectivity: Our national office operates on a full T-1 line that we initially paid \$800 a month for and now pay \$450 a month.

Network Server: The National Office network runs on a Gateway Pentium III 1.13 Ghz server with 512 MB of RAM (two 256 RAM caches) and two 36 Gigabyte hard-drives. The server includes a RAID card that allows a redundant hard drive that added \$600 to the cost, and an internal SCSI tape drive and CD writer. The total cost of the server including a three-year warranty with next business day on-site parts and repair was \$4,011. We chose to lease the server for three years at \$128 a month on a plan that allows us to buy the server for 10% of its initial cost at the end of the lease if we choose. The server has its own surge protector and a backup battery power supply (about \$250). Our server runs on Windows NT.

Virtual Private Network (VPN) and Remote Managed Access (RMA): Public Allies received a VPN Concentrator and software (retail about \$5,000) that (a) serves as Public Allies’ firewall, (b)



enables all sites to use our national office's Outlook Exchange Server; and (c) allows individuals to remotely enter the network through a password-coded "tunnel" that allows them to access their files remotely. We use Timbuktu (retail about \$2,000) and Microsoft Terminal Services (included with Windows NT) for our RMA provider and Director of IT Services to be able to remotely enter any user's computer for troubleshooting or repair.

B. Local Offices

Router and Switch: Local offices operate with a Cisco 2600 Router (retail about \$3,000) and a 2950 Switch (retail about \$350).

Network Server: Sites have a Gateway with an Intel Celeron 1.2 Ghz server with 256K of RAM and a 20 Gigabyte hard-drive. The server cost \$1,807 or could be leased at \$58 a month for three years with a 10% purchase price at the end of three years.

Connectivity: Before the network consolidation, each site had its own service. Various sites had different contract terms and costs. At one site, a faulty router on an ISDN line resulted in a one month charge of \$10,000 (we did not pay it). Managing multiple contracts made no sense, so we went initially with a re-seller identified by Cisco Systems called VCom Solutions. They found a volume discount for site connectivity. We now use one vendor, Speakeasy, which provides sites with solid DSL service which seems to provide enough speed for 3-10 people using our network locally. We have negotiated DSL services down to between \$80 and \$110 a month.

The servers, routers and switches for each office sits either on a desk or on a specially made shelf to ensure proper ventilation and protection. Our Director of IT Services photographed the network equipment in each site so he could picture it while handling any remote questions or challenges.

3. COMPUTERS AND PERIPHERALS

Public Allies sought three things in a computer vendor: (1) competitively priced quality products; (2) knowledge of nonprofits and willingness to make further discounts; and (3) solid warranty coverage and convenient technical support and repairs. We chose Gateway because they met these three criteria. They also had partners in each city we were in, including the RMA vendor we chose (see below) who could support our products. We researched their products online before our meeting with advisors to identify the machines they thought would be best and their retail prices – that made us much more prepared and able to evaluate their product and service proposal.

Desktops: Public Allies decided to get all employees Gateway desktops with Intel Celeron 1.26 Ghz processors, 256 MB of RAM, and a 20 Gb hard-drive. Public Allies purchased three year warranties for computers with onsite repair. The computer and keyboard with the protection cost \$686 or \$21.27 a month in a three year lease that requires us to purchase them for fair market value at the end of the lease.

Laptops: Public Allies allowed certain employees to get Gateway laptops. Laptops are Pentium III 1.066 Ghz processors, 256 RAM, and 30 GB. We also purchased a three year warranty and also accidental damage coverage. The laptop with coverage cost \$1,686 or \$49.95/mo. to lease.

Warranty Coverage: Public Allies leased all computers and laptops with three year warranties with onsite repair including labor and parts. The desktop computers have held up fairly well, but a few have required attention. More important if not essential has been accidental damage coverage for laptops – we've used it five times in two years! They send a shipper to come pick up the laptop and within 5 business days it is back in play. As stated earlier, our server warranty guarantees next business day repair.



Leasing vs. Buying: Public Allies could not afford the up-front investment to buy all of our computers and could not secure all donated hardware. As a result, we chose to lease our equipment. Finding that computers seemed to be out-dated in three years anyway, we chose the least expensive lease which would require us to pay fair market value at the end. We intend to lease new machines or secure donated ones at the end of the lease. For our servers, we chose the 10% buyout plan in case we needed them at the end. Our computers and servers are still very fast and effective more than two years in. We found that over three years, we would spend 11% more than if we had bought them outright – that’s less than 4% a year interest. Assuming that most computers seem to have a quality life of three years, this seemed the right choice for Public Allies.

Copying, Printing, Faxing and Scanning: Copiers have evolved over the last decade with more and better features at less cost. Each PA office now has one machine that serves as its network printer, copier, and scanner. Employees may print 100 double-sided, stapled copies from their desktop computers. Employees can scan documents into pdfs that are e-mailed to them from the machine. Faxes may be sent from desktops or the machine and are received there. Where we used to operate four separate machines, we now operate one at a cheaper cost than we used to pay for our copier alone (\$247 a month per office with all toner, service, etc.). PA also bought an HP LaserJet 2500N color printer for about \$2,000 after realizing how much we spent on color at Kinko’s annually.

4. INSTALLATION, MAINTENANCE, SECURITY AND BACKUP

Prior to its engagement with Cisco Fellows, Public Allies had planned that each local office would identify a Cisco-certified vendor that could install their networks, load their software, provide weekly back-up and security services, and fix problems. The Cisco Fellows helped PA identify a more cost-effective, centralized option: outsourcing installation and maintenance nation-wide to a vendor who could provide necessary services online through Remote Managed Access (RMA). The Fellows obtained two bids, and PA obtained one bid through a Gateway partner. PA chose the latter bid because (a) the firm, Wiscomp Solutions, had Gateway partners in each site who could go onsite as needed, (b) the partner was Cisco and Microsoft certified and could provide warranty work on the Gateway machines, and (c) the partner could amortize the costs of installation and maintenance over the three year term of the Gateway lease.

Installation: Public Allies contracted with a vendor to install, maintain, and backup our networks. Installation costs for the organization were \$17,000 including travel and approximately 2 days each spent in ten offices. A local vendor spending two days installing a network at \$75 per hour may cost about \$1,200. The vendor installed the network and made sure that each employee’s computer was fully functional and showed employees how to save work to and retrieve work from the network server.

Remote Managed Access: RMA enables our vendor to manage our network remotely (using the Timbuktu software mentioned earlier). The retail price for the RMA services in 2002 were \$1,500 per server and \$190 per desktop or laptop per year (PA received a 10% discount). For this payment, we were to receive weekly system backup, maintenance reports on the capacity and use of our systems, and network and computer support for employees. RMA requires a VPN-configured Router so that the vendor can enter the network to provide support. We contracted that they have someone on call by a 1-800 number during extended working hours. If an employee calls, the RMA provider may actually enter their computer to fix it.

Help Desk and Maintenance Blocks: Public Allies decided one year into our contract to split our maintenance services. We contracted with Gateway for Help Desk services at a cost of \$7,000 a year. This enables an employee with desktop or laptop problems to contact the Help Desk for support (the Help Desk answers “Public Allies Technical Support, may I help you?”). The Help Desk may not enter remotely, but are able to diagnose if the problem is software (they can help), hardware (they can initiate warranty claims), or network (it goes to our other vendor, WisComp). In addition, we purchased blocks of hours at \$75 per hour from our RMA vendor (averaging 2 hours per week or 100



per year) for network maintenance, server errors, VPN glitches, etc. – higher-end and higher value tasks. We use “Syslog” to track all network activity and analyze it regularly with the vendor.

Escalation: Our Director of IT Services is informed by e-mail whenever employees contact the Help Desk and he can monitor the work to ensure it is meeting employee’s needs. He has put in place “escalation procedures” to ensure that problems go up the chain of command with the vendor and with us if they are not meeting our expectations and timeline.

Security: Public Allies uses its VPN Concentrator for its main firewall, but is exploring a second firewall from Cisco (retail about \$3,100) to reach DMZ (“a de-militarized zone), which means that if someone gets in the network they hit a dead end and cannot get from one site to another. Public Allies uses Norton Enterprise software (retail about \$700) for basic security, and the software automatically updates itself constantly so we have the most current protection. Remote users are prevented from using e-mail and the Internet simultaneously while on VPN to prevent someone from entering our e-mail server via an employee’s browser (employees can review e-mail over the web without using their outlook if they wish to do both simultaneously). Employees sign a technology policy that explicitly prevents them from downloading information without permission from Public Allies. We also strongly encourage employees not to open any e-mail or documents from sources they do not know or with “odd” subject headers.

SPAM: Public Allies uses Baracuda (\$3,100 for network installation, software, etc.) software which collects all suspected SPAM each day in one e-mail that employees can review. While it sometimes catches non-SPAM, employees may “whitelist” the sender so they are not blocked again.

Backup: All employees are to save documents on the network server. There are three areas on the network server for employee documents: (1) The U drive contains everyone’s individual folders and synchs with their folders on their desktops or laptops; (2) the P drive contains shared files and folders for a particular office; and (3) the X drive contains shared files and folders for all staff. Employees are strongly encouraged to share files. Employees are also asked not to e-mail documents but to e-mail links to the folder in the P or X drive where they can access the document as to not crowd the e-mail server. Laptops are automatically backed up when they plug into the network as the server synchs their My Documents folder with the folder on the U drive backing up new or edited documents. The network backs up differentials (any changes in any files) every day for each user and server and conducts a full backup of all files and servers every weekend. Public Allies uses DLT tapes and Veritas Software for our backup (software, 12 tapes and installation about \$3,400). It is now more cost-effective for most groups to outsource their backup services.

5. SOFTWARE

Basic Office Software: Public Allies uses Microsoft Windows NT, Windows XP and Office 2002 for its basic software. Public Allies received a Technology Leadership grant from Microsoft for a network of up to 14 offices and 80 users. To learn more about Microsoft’s giving programs, visit <http://www.microsoft.com/mscorp/citizenship/giving/overview/>.

Microsoft products may also be purchased cheaply through TechSoup, a nonprofit technology provider in San Francisco, CA that is a great resource for nonprofit technology. TechSoup manages Microsoft’s software donation program seeking a relatively small price for their service, shipping, and handling. For instance, Microsoft Office Professional, which retails at \$600 sells on Techsoup for \$40. Visit <http://www.techsoup.org> to learn more.

Contact Databases: Public Allies had initially sought a grant to purchase the Raiser’s Edge from Blackbaud, which would complement our Blackbaud financial software. A donor we approached for such funds suggested using an Application Service Provider (ASP) which basically rents space on a software program with some customization for the client. We have used an ASP for our fundraising and contact database for three years. The application is available online through a password and has information set to fields related to PA’s work (alumni for example), manages online donations (credit



card donations made through our website go through them and record information in the person's contact or generates a new contact), and serves as our main fundraising database. We currently pay \$700 per month for the service, a cost that has risen because of the number of contacts and the access provided to eleven different user groups (a site only can see their site's information).

Because of the cost we are now paying, we are considering purchasing software again or building our own. One initial concern with our ASP is that we sought to reconcile alumni records with their profiles on our alumni portal so that if an alumna changed her address in her profile, it would do so in our database. That has not worked out. We also want individuals' Outlook contacts to reconcile with the database as people often put contacts into their individual Outlook contacts rather than in the database. We are currently exploring the next phase of our database development and use.

6. E-MAIL

Public Allies began with AOL accounts with each office holding one account and staff members email addresses were all AOL-based. In 1997, we registered our domain name (We use Network Solutions; it costs about \$30 per year – cheaper the longer you do it) and created @publicallies.org e-mail addresses with our Internet Service Provider, but by 2000, we were spending over \$30K a year for our ISP and e-mail addresses. As we consulted with various people, no one seemed to know a way to cost-effectively set up e-mail without an e-mail server.

A consultant in Silicon Valley helped us set up an account with Crystaltech (<http://www.crystaltech.com/standardshared.htm>) that allowed us to store hundreds of e-mail addresses for a flat rate of less than \$40 per month. This worked well for us for some time, although when peoples' email boxes were left too full, we had challenges a few times. It was easy to create and dispose of e-mail accounts, employees received e-mail through their Outlook when at the office and could view it through a web browser when they were out of the office.

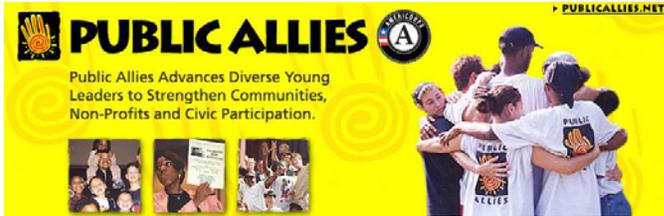
Our Director of IT Services decided in 2003 to convert Public Allies to our own Outlook Server. Doing so required us to dedicate a server to e-mail and utilize Outlook Exchange Server software. The maintenance, security, and backup of this server are managed through our RMA provider. The benefit is that now we can share documents through Outlook, calendars are shared, common distributions lists are set up, and employees can also view their e-mail remotely through a web-interface. We still maintain an inactive account with Crystaltech for \$17 a month in case our e-mail server goes down (e-mail is directed to the Crystaltech address and employees may use e-mail online).

7. WEBSITE

The www.publicallies.org website was originally set up by a volunteer in 1996 who saw us on C-SPAN and there it stood for five years as it was first created. Three local Public Allies offices had their own static websites. In 2001, we contracted with Plugged In, a Partner Organization of ours in East Palo Alto that was led by a former staff person, to engage their young people in the development of our site. It was far better and more comprehensive than what we had before, but it was still static.

In 2002, we worked with a vendor identified by Cisco Systems on the development of a website that was built with "dynamic content management." The architecture of the site was set up by the vendor with page templates for all content pages we had identified. The templates enabled Public Allies to easily add text, photos, and pdf documents to each page almost as easily as in a Word Document.

In any given page, Public Allies can choose page elements and keep adding or re-ordering the elements (i.e., on our News page, if something really exciting has happened, we can add a page element on top of all of the existing page elements with photos or graphics if we wish. Uploading a photo or graphic is as easy as attaching a document to e-mail. Text may be entered in any fonts with bold, underline, italics, and other formats and with links to other web-pages or e-mail addresses. With Dynamic Content Management, Public Allies can easily keep our website up to date without a full-time web designer or developer.



Vision & Mission

Click here to select page elements

Last Update: September 16, 2003

Text with Right Photo (instructions)

upload photo
remove photo
photo instructions



Enter headline below (published as bold text)
Vision and Mission

Enter text below (plain text)

Public Allies envisions communities where people of different backgrounds, beliefs and experiences work together and share responsibility for improving their own lives and the lives of those around them.

(limit: approx 500 words)

add/modify URL link

What's New, Upcoming Events, Get Involved!, Become An Ally, Post Opportunities, PublicAllies.net

Modify Link for "Get Involved!"
To modify the link that appears at the end of the text, complete fields below and click Submit.

Element Management System
This system allows you to select the elements that will be included in the published web page.

Text Formatting Instructions
Note: Please use the following tags (known as BB Code), a simplified version of HTML, in your posts to create certain effects.

The Dynamic Content Management system makes updating the website very easy

The website also is consistent with and connected to our www.publicallies.net portals (the portals are password coded so are not able to be seen by people outside the organization).

8. WEB-BASED PORTALS AND TOOLS

As described on page 9, Public Allies' Intranet has four portals with information for Allies, Partner Organizations, Alumni, and staff. These portals are all located at www.publicallies.net.

Public Allies Alumni Portal screenshot showing navigation menu and content.

The Alumni Portal

Public Allies Staff Intranet screenshot showing navigation menu and content.

The Staff Portal



- **Directory:** The Directory allows alumni to keep in touch with old friends and build new relationships (alumni have access to staff and alumni profiles). Allies are able to search out and learn about other Allies. Staff have access to everyone's information. Allies, Alumni, and staff have created profiles with contact information, issue interests, field of work, favorite quotes, a photo, things they'd like to learn and things they can teach, and whether they want e-mails sent to them by Public Allies or other alumni based on the information in the directory (e.g., alumni can send e-mails to everyone in Milwaukee and Chicago interested in economic development, etc.). The directory is searchable by group (staff, Allies, alumni), name, site, Ally class, field of work, and issue interests.
- **Opportunities:** The opportunities section offers a wide variety of job, education, and volunteer service opportunities to advance the careers and leadership of our alumni. Opportunities are posted by PA staff and also can be entered by anyone through the front-page of our www.publicallies.org website. Opportunities are divided into Employment, Fellowships, Grants, Scholarships, and Volunteer/Board Opportunities. Alumni and staff have access to the Opportunities section. Allies gain access to Opportunities the second-half of the program year as they begin their outplacement.

Post Opportunities
Recruit from our network of over 1,500 energetic, skilled, and diverse young leaders. Post job descriptions, volunteer and board positions, educational opportunities, and more into our PublicAllies.net. [Post opportunities here.](#)
- **Discussions:** Allies, Alumni, and staff may form chat rooms on a variety of topics (334 groups have been created in two years). Current chat topics include: facilitation skills, applying for law school, Bush's CIA nominee, Iraq and Afghanistan, and religion. Alumni see only chat rooms created by alumni and Allies only see chat rooms created by Allies. Staff see all chat rooms and can create their own and decide whether only staff will see it or if Allies and/or Alumni can participate as well. In addition, there is a section that allows alumni to describe a list-serve they seek to create and a link to yahoogroups.com so that they may create or join the list-serves. Examples of list-serves include DC politics, Creative Collaborative (for artists), and site alumni list-serves.
- **Resources:** All user groups see the Resources section. The Resources section allows people to post interesting web links, articles of interest and other items, which are then grouped by topics showing the number of items for each topic. For example, there are 18 items posted under "Education," 30 items under "Youth," 24 under "Career Development," 10 under "LGBT Issues," 52 under "Leadership," and 14 items under "Fundraising." When one posts a resource, they may write a brief summary of the resource.
- **News, Events:** News and Events are posted by Public Allies staff who choose whether they should be seen by one, two, three, or four groups. News typically consists of announcements and events include PA events and events submitted by Allies and alumni that may interest others in the network.
- **Action:** The action section exists on the Staff and Alumni portals and allows members to collaborate with and mobilize each other. People can post activities (voluntary service or advocacy) and generate automatic e-mails to staff and alumni based on their issue interests and location. For example, recent actions posted include the Youth Justice Forum in NYC, Chicago Coalition for the Homeless needing volunteers, and an alumna who is completing a thesis on public health and is seeking information from young women across the country.
- **Human Resources:** Staff only. This section makes constantly available to staff forms, policies and manuals, and links they need as staff. There are sections for new and departing employees with all necessary forms. Employee personal-time-off day (PTOs are a combination of vacation and sick days), check requests, and reimbursement forms are completed online and



automatically e-mailed to supervisors. This section also contains all benefit forms, links to benefit vendor websites, and other helpful information.

- **Program:** Staff only. This section includes our program baselines, standards, methods, and templates of best practice forms, documents, and web-links for use by staff across the country. For new staff or new sites, it has everything needed to learn and implement the Public Allies program and fosters the sharing of best practices among sites.
- **Development and Communications:** Staff only. This section includes fundraising policies, fundraising plans, sample proposals, Public Allies logos, communications templates and documents, and links to news articles and other items on Public Allies for staff.
- **Staff Timesheets:** Staff timesheets are completed online. When completed, an e-mail goes to the supervisor so they may go in and approve it or send it back to the employee for revisions. When approved, timesheet information is databased for financial reporting.
- **Personal Impact and Service Documentation (PISD):** The most impressive feature of Public Allies' portal is our PISD.
 - Allies use the PISD as their service timesheet. Beyond time spent in service and training, they track their progress on up to two outcomes and three objectives defined by their Partner Organization, track outputs such as volunteers generated and linkages formed with other organizations, and report on their trainings and success stories.
 - Partner Organizations go into the PISD to review and approve the Allies' information each week (when the Ally submits the information, their supervisor gets an email that it is ready for their review).
 - Each Ally's Program Manager at Public Allies approves the PISD data once the Partner Organization has approved it (an email comes to them informing them it is ready for approval).
 - Leadership staff at Public Allies have access to the Report Generation module which compiles and aggregates information (once fully approved) from the PISD for monitoring quality and reporting on results.
 - After finding the cost of purchasing a customized 360-degree evaluation tool too expensive (Allies are evaluated twice a year by fellow Allies, their Partner Organization supervisor, their Public Allies Program Manager and themselves) on their practice of our values, we built our own as part of the PISD module for \$12,000 (we had received bids from \$20,000 to \$100,000 for buying existing products).

Target Group	Outcome (Results)	Indicator (Measure) & Standards	Number people served by this outcome	Number of people achieving outcome	Percentage of people achieving outcome
volunteers	Volunteers will develop & implement Aluminum Cans Build Habitat Homes (ACBHH) programs.	Ten volunteers (groups or individuals) will implement ACBHH programs in the DC area.	450	420	93.33

Cost of Portals: The cost of building all of this was initially \$50,150 (the contract spelled out \$22,500 for the alumni portal, \$12,500 for the Intranet, \$9,130 for the PISD, \$4,500 for the conversion of our .org website, and \$1,500 for staff timesheet module). Since building it, Public Allies spent \$23,970 on upgrades over two years (\$12,000 on the 360 tool, \$8,970 on PISD upgrades, and 3,000 on Alumni upgrades). *Public Allies is currently seeking a vendor who can replicate our PISD, alumni portal, or other tools for other organizations at a fraction of our original cost (contact Tahir Hassan at Public Allies, tahirh@publicallies.org, to get connected).* If you contract with someone to build your own



tools, make sure you own them. Once you build online tools, budgeting for upgrades is important as you will learn a lot in your first years and may seek to improve your web-based tools or bring new organizational tasks and functions to the web.

Web Hosting: Public Allies hosts the .org and .net sites on a vendor's server. The vendor guarantees bandwidth, security, and backup. Public Allies had been paying as much as \$550 per month for web hosting, but our current vendor hosts our website, portals, and online tools for \$120 per month.

9. OTHER WEB-BASED TOOLS

Public Allies uses two other web-based tools extensively in our work.

- **SurveyMonkey:** Public Allies uses www.surveymonkey.org for surveying staff, Allies, alumni, board members and other constituencies for evaluation, decision-making, and other purposes. Public Allies pays \$30 per month as a member and has administered 25 surveys to date. Zoomerang is another web-based survey tool.
- **Web-Ex:** Web-ex provides conference calling and web-based conferencing functions. It allows one person to present information from their computer screen (a document, website, etc.) to other individuals. Web-ex has many features that allow one to record their online presentation, poll people who are in the meeting, send quick messages to individuals or the whole group during the presentation, etc. We have found it especially helpful for delivering "Webinars" – online trainings to staff that used to be conducted in person or by phone. Public Allies pays \$450 per month for 12 licenses on Web-ex's Internet tool. We have saved far more in travel and training costs. We use a separate company for the telephone portion of the meetings (employees look at a web-ex screen while participating in a conference call from another vendor, C3 Communications, for 10 cents a minute each).

10. INTEGRATING USE IN THE ORGANIZATION

Once you've begun to implement technology, expect a lot of training. We initially contracted with Web-ex so we could train employees remotely on using their technology and now use it for other kinds of training. Showing people how to use technology, however, is not enough. If you build it, they will not come.

The challenge in helping people absorb technology and adapt to its use is forming habits. It is important to help employees gain the right habits in technology use (saving documents into shared network drives rather than e-mailing them, scheduling meetings with each other over Outlook, not opening e-mail from people they do not know, etc.). There are ways to incent use, and even force use. Automated e-mail reminders can be cheaply built into systems so that people don't forget their responsibilities. Public Allies set up automatic synchronization of laptops with our network server so employees did not have to remember to back up their hard-drives.

Content, however, is also important. One of the first things we learned about using web-based resources is that to make them interactive, someone has to be interacting! Generating useful content, e-mailing people about new resources or events on the site, and other activities carried out daily help employees return again to the site and make it into a habit that they can carry on.

Technology Policies: Technology policies are also important. Public Allies Employee Manual has technology policies. Our Site Operating Policies also have technology policies. We also have a separate technology policies document all employees must sign that outlines proper and improper use of our computers and networks. It is important that they be understood and more importantly enforced with support from the very top. All it takes is one employee to download information or conduct an improper activity for the whole system to go down. If you make the investment, make sure you use it well. Technology and all that sits on it (files, documents, etc.) belong to the organization and not the employees.