Avoiding and Solving Problems Selecting and Implementing Integrated Philanthropic Information Systems

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The Basis of IAA’s Perspective

- 200+ grantmaking clients worldwide
- We’ve evaluated 50+ different grant systems
- Our clients have used 15 different major grants management systems
- Diverse professional background as a grantseeker, grantee, consulting program officer, foundation senior executive, senior management consultant, and Chief Information Officer
- Consultant for Idealware’s bi-annual grantmaking guide
To Dream the Impossible Dream

- A seamlessly integrated grants management system with links to other online services and in-house applications
- Has a great modern user interface
- Is powerful and easy for everyone to use
- Great support from the service provider
What are your **greatest needs** about **integrated foundation information system** service providers and their hosted systems?
27 Major North American Integrated Foundation Information System Grants Management Service Providers
Grantmaker Feedback

- Seamless integration of grantmaking systems
- Improved service
- A better user interface for everyone
- More needed features
- Better backend efficiency
- Reliable systems
- High level of security
- Better searching
- Improved reporting
- Mobile accessibility

- Better 501(c)(3) validation
- Grant outcome tracking and reporting
- Global reach for your staff and nonprofits worldwide
- Multi-currency
- Links to external services and our accounts payable
- Responsiveness/timing of disaster relief sites
- Shorter lapse time to donate funds
Some Major Reported Challenges with Grantmaking Systems

- Not meeting all of our needs
- Problems with services and inexperienced provider staff
- Insufficient configurations, and personalizations
- The UI is too complicated
- Poor web browser compatibility
- Integration with other systems
- Searching and reporting our data
- Vendor sunsetting their system
- Staff real willingness to change
- Affordable transition and ongoing costs
More than Migrating Data *

- In addition to migrating all data and attached files, who will also migrate, configure, or reconfigure all:
  - User access rights
  - Hierarchical code tables
  - Write-up templates
  - Correspondence templates
  - Online application forms
  - Online review forms
  - Online grantee reports
  - Saved searches and favorites
  - Workflows
  - System and ad hoc reports and favorites
  - Budgets
  - Graphical dashboards for each team and/or user
  - Links to all external systems

* Each of these are specific to different systems
What are the greatest problems you encounter selecting and running your core systems locally and from the cloud?
Key Factors in Vendors Managing Acquisitions and Partnerships

- Underestimating their challenges merging very different organizations
- Managing different business models and leadership styles
- Scaling up to hire, train, and manage more staff plus effectively support more clients
- Figuring how to realistically link and integrate entirely different technologies
Case Study
Selecting a New System

- How do we go about specifying our prioritized new system requirements to select our best-fit integrated system?
  - How do we determine our key requirements?
  - Which is better, a customized system or a commercial system that enables extensive personalized configurations?
  - Should we be concerned about having all our core system software and data off site in a vendor hosted commercial data center?
Selecting a New System
The Pitfalls

- Not developing an **up front** prioritized list of **Required** and **Desired** 5 = High, 1 = Low specs

- Not requiring all RFP respondents to specify in writing if and how their system can do each of your key things

- Foundations grossly underestimate all of the work necessary for their staff to decide, specify and configure the new system.
Selecting a New System
The Pitfalls

- No personalized demo script with your key specs for each vendor to adhere to in the live presentation of their latest current production system

Global Foundation

Vendor / Service Provider:

Demonstration Requirements:

Proposed facility will be expected to demonstrate the current standard (not customized) production system on our standard configuration: Windows 10 desktop PC (provided by the vendor) using Internet Explorer 3.0 in March 2017. You will be providing to the project team (as described above) either in person or by webinar.

During your three-hour demonstration, you would please be sure to:

1. The system and functionality noted below must be demonstrated first. Those portions you are required to demonstrate take the form of your system.
2. Expect and allow adequate time for questions throughout your presentation.
3. Please manage time carefully to ensure that you have allotted sufficient time to demonstrate all the required features.
4. Please order the sequence of the demo as shown below.
5. Specifically, identify which features will be demonstrated next so that we can follow along and ensure we cover all required areas.
6. If your system cannot currently do one or more of these capabilities, please explain this up front, skip it, and continue.

Rating scale:

5 = Excellent: Does completely and subtly
4 = Very good: Does completely but not subtly (e.g. does not interact, many steps)
3 = Good: Does in an acceptable way (passing a worksheet)
2 = Poor: Does poorly
1 = Unacceptable: Cannot see as is
0 = No current capability

<table>
<thead>
<tr>
<th>Creditability</th>
<th>Ratings</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Submit an revised online proposal (with a URL, login ID and password) for a new grant.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. Demonstrate receipt of proposal and reports from the grant maker perspective, including associated status changes (e.g. required report recorded and data automated coding that it is in pending review and finally approved).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Demonstrate a current portal and how reports and executive comments are entered and then accessible to program staff, grant managers, and potential external reviewers.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 2. Demonstrate a program portal and how a program can:
  - update their previously entered contact information;
  - see how we can review and approve contact information changes;
  - see requirements due;
  - submit a program request that includes both data fields and a required attachment such as an Excel budget. |
Migrating to a New System
More Pitfalls

- Missing key capabilities in the new system that you assumed would be there just like the former system.
- Lack of comprehensive new system acceptance testing by the grantmaking staff.
- Finding and fixing lots of duplicate organizations, requests, and contacts.
- Missing data and documents that weren’t migrated because they weren’t provided.
Case Study
Poor Legacy System Integration

- Our legacy non-integrated systems don’t/didn’t work well together at all.
  - What things caused this major limitation?
  - What do we now need to do when selecting and configuring our new fully web-based remotely hosted system to prevent this from happening again in the future?
Case Study
Reliability and Pot Holes

- Many of our workstations and applications are locking up and aren’t running reliably.
  - What are possible causes of these serious “pot hole” problems? How can we fix this?
  - How do we prevent this from happening again in the future?
Case Study
System Acceptance Testing

- We discovered that after we cut over that all user access doesn’t work and our data migration wasn’t complete.
  - What was missing?
  - Why did this occur?
  - What should we have done differently?
Web User Interface Issues

- All claim to provide broad Web browser access to your grantseekers, grantees, staff, reviewers, board, and the system administrator.

  But there are many problems with the different browsers and versions

- Some are providing limited access to mobile apps
Browser Use in North America

<table>
<thead>
<tr>
<th>Browser</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrome</td>
<td>53.31%</td>
</tr>
<tr>
<td>Safari</td>
<td>28.84%</td>
</tr>
<tr>
<td>Firefox</td>
<td>4.89%</td>
</tr>
<tr>
<td>IE</td>
<td>4.76%</td>
</tr>
<tr>
<td>Edge</td>
<td>3.78%</td>
</tr>
<tr>
<td>Samsung Internet</td>
<td>1.86%</td>
</tr>
</tbody>
</table>

Source: http://gs.statcounter.com/
## Browser Use Worldwide

<table>
<thead>
<tr>
<th>Browser</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chrome</td>
<td>61.51%</td>
</tr>
<tr>
<td>Safari</td>
<td>15.16%</td>
</tr>
<tr>
<td>Firefox</td>
<td>5.02%</td>
</tr>
<tr>
<td>UC Browser</td>
<td>4.42%</td>
</tr>
<tr>
<td>Opera</td>
<td>3.16%</td>
</tr>
<tr>
<td>IE</td>
<td>2.87%</td>
</tr>
</tbody>
</table>


Chrome is strongly on top and growing
Case Study
Slow System Response Time

- Our system response time is extremely slow accessing and running searches and reports from our remotely hosted web-based grants management system.
  - What are possible causes of this problem?
  - What tests can we run to find out and verify the suspected causes?
  - What do we need to do to fix this?
The actual speeds of Internet access from different locations

- Internet speed tests were run from https://www.speakeasy.net/speedtest to test upload/download speed from nonprofits worldwide to a grantmaker’s NYC-based server.

<table>
<thead>
<tr>
<th>Location</th>
<th>Download Speed</th>
<th>Upload Speed</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York City</td>
<td>86.2 mbps</td>
<td>87.2 mbps</td>
</tr>
<tr>
<td>Manila, Philippines</td>
<td>20.02 mbps</td>
<td>19.94 mbps</td>
</tr>
<tr>
<td>Other Philippines locations</td>
<td>3-5 mbps</td>
<td>3-5 mbps</td>
</tr>
<tr>
<td>Sao Paulo, Brazil</td>
<td>7.87 mbps</td>
<td>5.78 mbps</td>
</tr>
<tr>
<td>Dhaka, Bangladesh</td>
<td>1.1 mbps</td>
<td>2.4 mbps</td>
</tr>
</tbody>
</table>

*mbps = megabits per second*
50 Lane Traffic Jam in Asia

See the bottleneck of all traffic narrowing after the toll
Case Study
Overall System Security

- We have security problems – we keep getting computer viruses and security breaches that shut down our systems.

  - What are some of the most likely causes of this serious problem?
  - How can this now be fixed?
  - What can we do to prevent this from happening again in the future?
  - Would Single Sign On (SSO) be helpful?
Case Study
Backup & Disaster Recovery

- We just had a major disaster and are now unable to recover any of our production system data.*
  - What are the likely causes of this real world* problem?
  - What do we need to do to prevent this from happening?
  - How can we test that it will actually work?

* IAA knows of two major grantmaking organizations that actually experienced this
Causes of Data Center Outages

CRAC = Computer Room Air Conditioning

Some Key Pitfalls

- An unbalanced legal agreement with no recourse that favors only the service provider
- Believing everything that you were told without documenting this in writing as part of the contractual agreement
- Changing of the guard on both the grantmaking and the service provider staff
- Genuine misunderstandings between your staff and the service provider’s project manager
Some Really Good Advice

- Just because you can do it doesn’t mean you should do it!
- Technology alone really won’t solve all of your problems.
- Before changing do your homework.
  - Identify the *real pros and cons*
  - Conduct *site visits*
  - Ask lots of really *good questions*
  - Be realistic about *risks*
Time for spirited questions!

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609-924-6936
Please join us at 7:30am tomorrow in the Grand Ballroom for the breakfast roundtable to discuss more about this important topic
How was this session?

Use your Guidebook app right now to rate this session (1 to 10).