



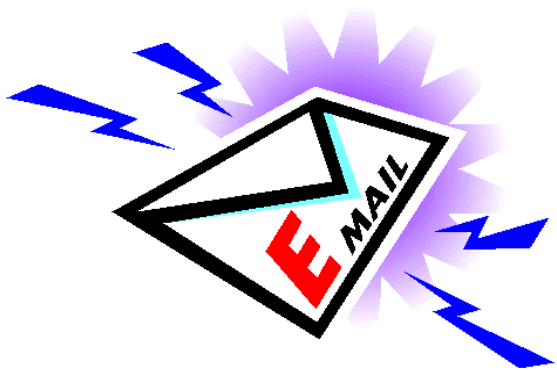
Tech Assessment as a Planning Tool

November, 2009

Julia Riseman

Mentor

Grinspoon Institute for Jewish Philanthropy



Agenda:

- What is the Tech Assessment?
- How is it a planning tool?
- Does it relate to our strategic plan?
- What are some examples?
- How do we get a Tech Assessment?

Get more out of your tech at: www.gijptech.org

What is the Tech Assessment?

The GIJP Tech Assessment

- Evaluates your tools and processes for Alumni outreach and fundraising
- Reviews your use of donor data base, communications, and internet
- Provides specific recommendations and action steps over one year time frame

Tech Assessment evaluates:

- Donor Data Base
- Alumni Outreach
- Web page
- Internet “foot print” in social media
- Communication



GIJP's primary focus:

Tech for **fundraising** and communication

Tech Assessment Step-by-Step

1. Answer questions
2. Get report
3. Evaluate options
4. Set goals
5. Contract for help

Answer Questions:

- People
 - Who: Alumni and donor outreach
- Process
 - How: How is your data managed?
- Product
 - What: Data base systems are you using currently?

Tech Assessment Step-by-Step

- Answer questions
- Get report
- Evaluate options
- Set goals
- Contract for help



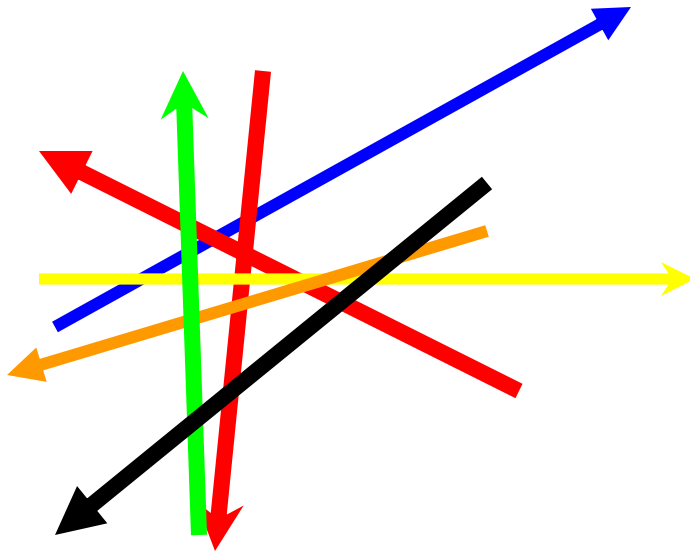
Planning Tool

| Task | Description | Persons Responsible | Due Date | Priority |
|---|---|-----------------------------|------------|----------|
| Implement Alumni and Development Committees | Implement Alumni and Fundraising Committees with clearly communicated responsibilities for Alumni Outreach and Fundraising. | Camp Committee Staff | July 2009 | High |
| Implement new Camp website | New site should be easy to update (for free) and offer a special Alumni section | Staff/Board | Early 2010 | Med |
| | | | | |

Does it relate to Strategic
Planning?

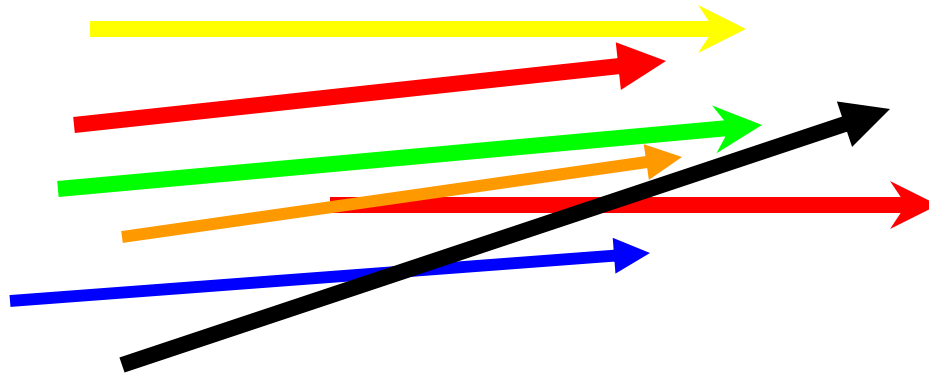
Purpose of Strategic Planning: Alignment

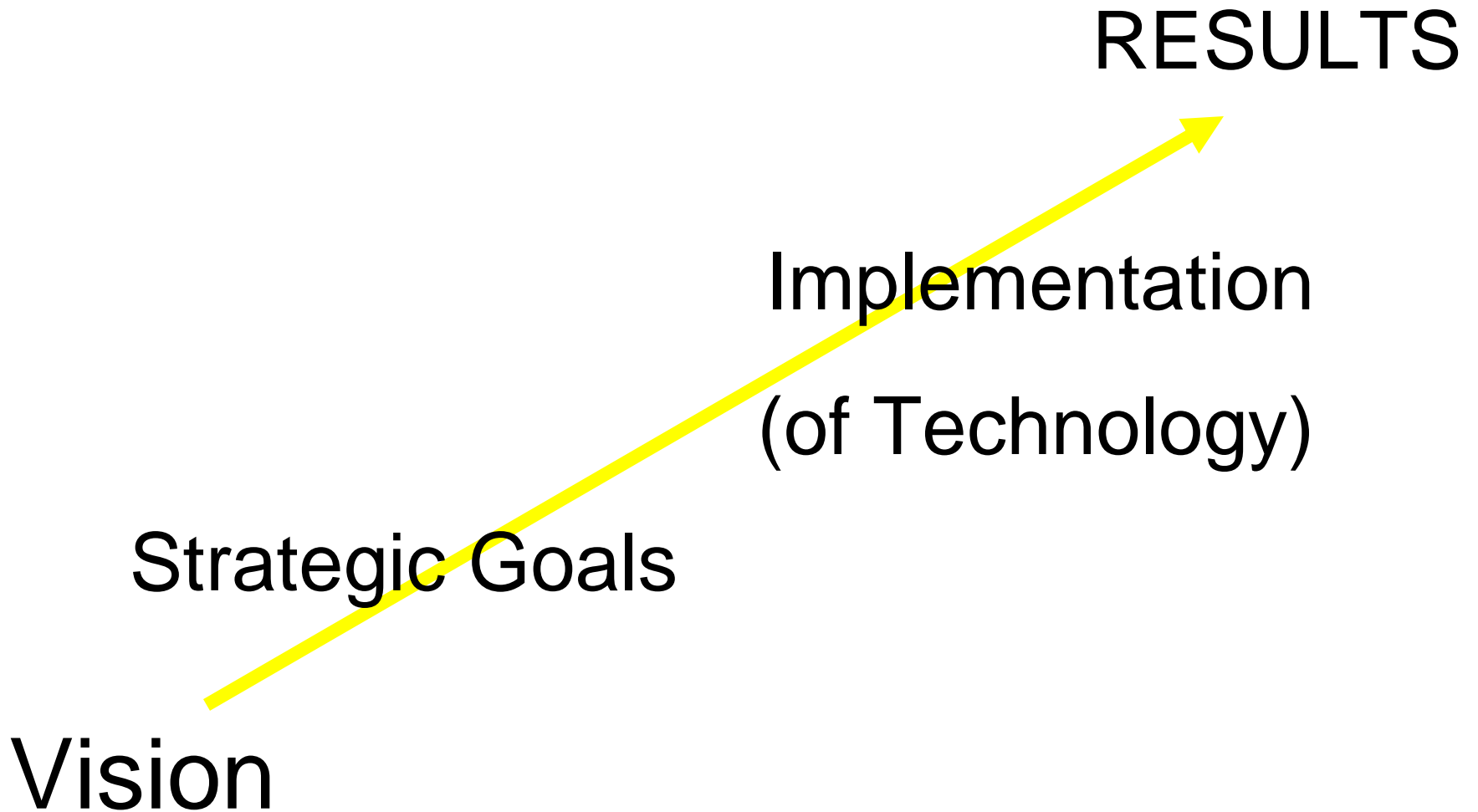
What direction is the camp moving in?



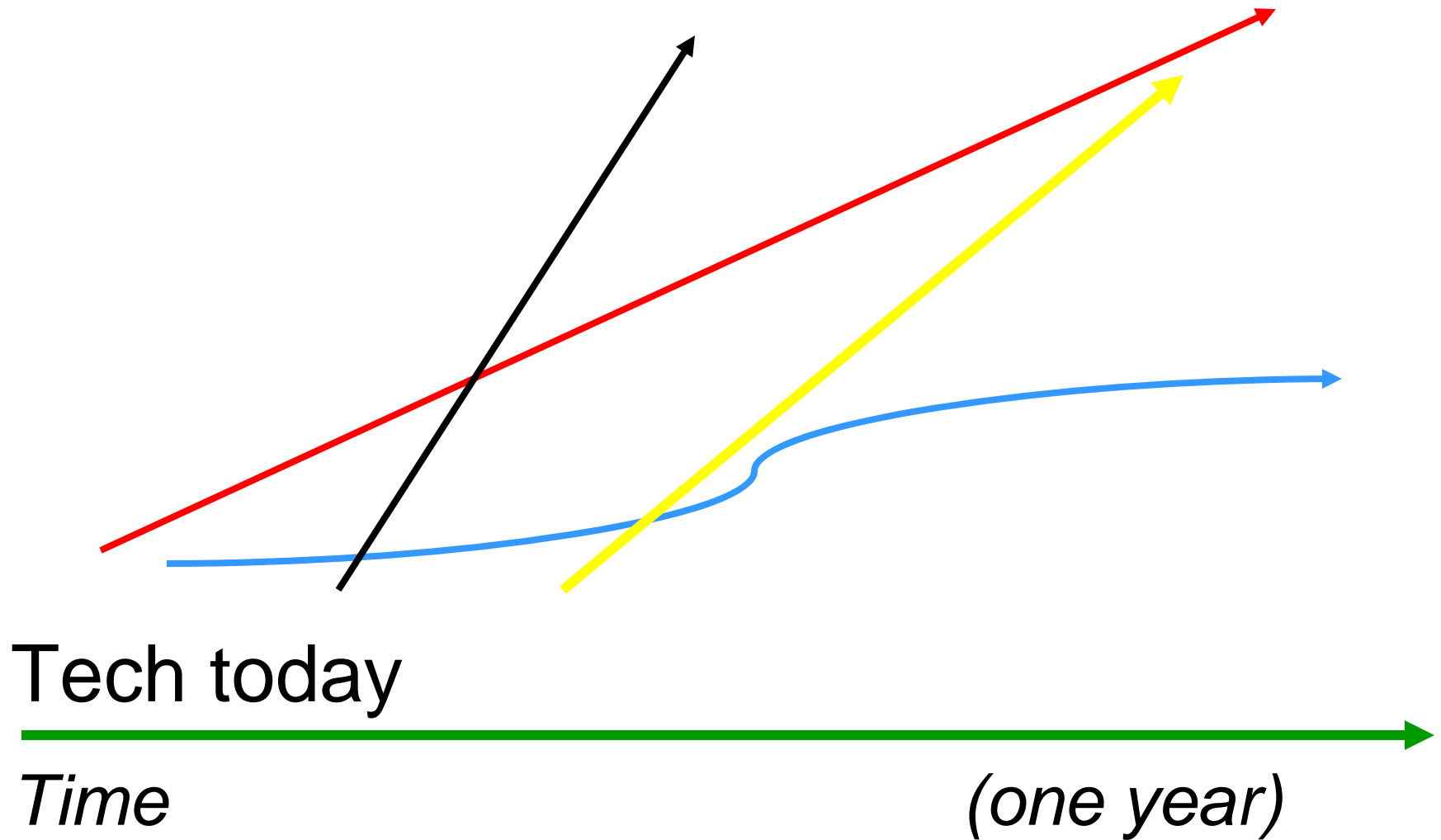
Purpose of Strategic Planning: Alignment

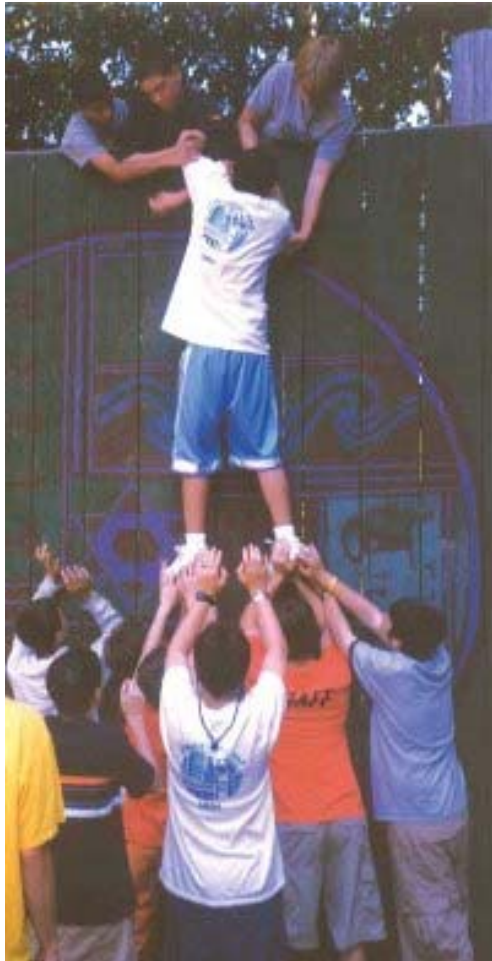
▪





The Grinspoon Tech Assessment Report





If you are working on something exciting that you really care about, you don't have to be pushed.

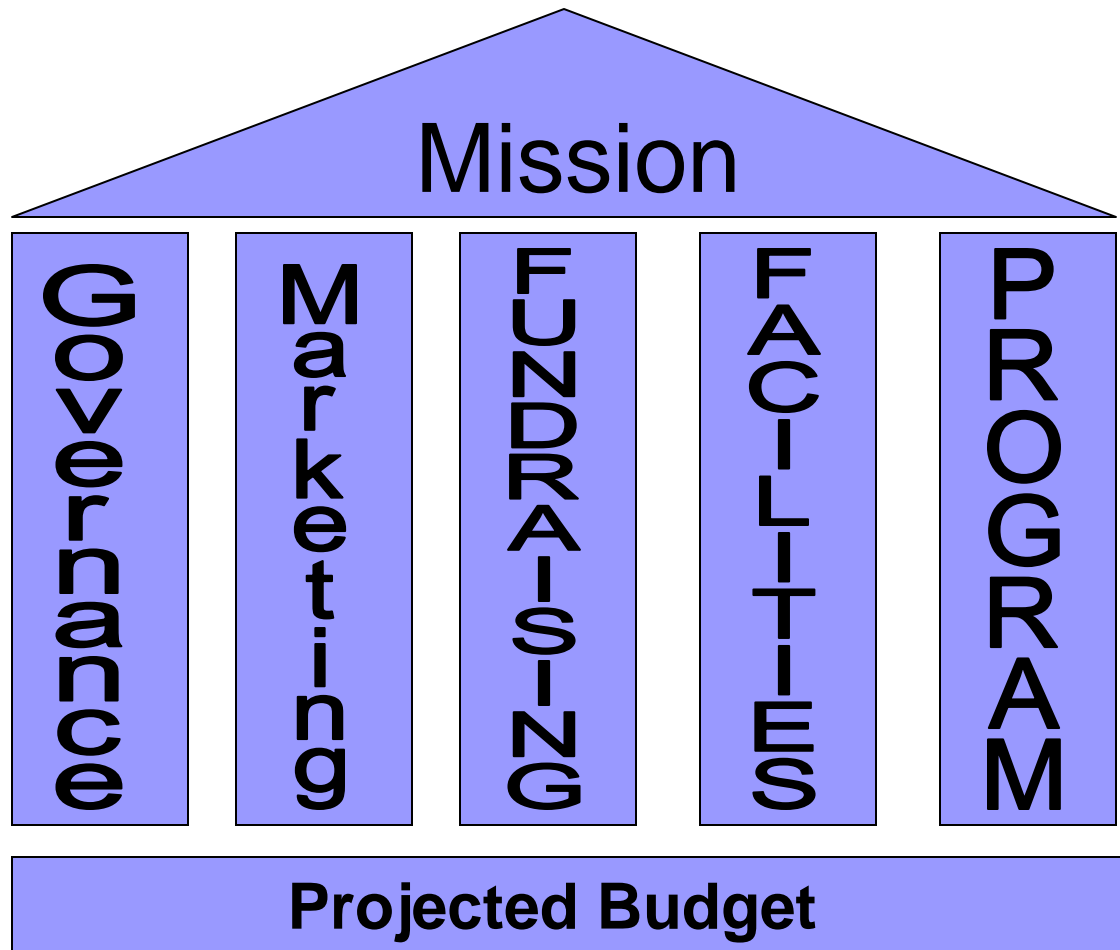
The vision pulls you.

Stephen Jobs

Camp Ramah in the Berkshire's 7 Strategic Goals



Camp B'nai B'rith Strategic Goals



What kinds of things are possible
with Tech?

Front End

Back End



Front End = Public Face

Brand Marketing PR

- Parents
- Staffers
- Alumni
- Supporters
- Board
- Campers
- Renters





PHOTO GALLERY **EMAIL A CAMPER**

The Summer that Lasts a Lifetime

WELCOME TO
Camp Ramah in the Berkshires **ברוכים הבאים**
מחנה רמה בברקשיירס

Nestled in the scenic foothills of the Berkshires in Dutchess County, NY, Camp Ramah provides an unforgettable overnight camping experience.

Our two hundred acre site boasts a beautiful lake and first-class sport facilities. The Ramah experience is rich and varied, combining fun and excellence in summer camping with the opportunities for children to grow, learn, and create life-long friendships in a nurturing Jewish environment.

[Come in for a tour of this wonderful experience called Ramah »](#)

CAMP COUNTDOWN
268
DAYS

CAMP WEATHER
55.9°F
Overcast

HOME
THE RAMAH EXPERIENCE
CAMPERS
ABOUT RAMAH BERKSHIRES
PARENTS
ALUMNI
STAFF
NEWS
CONTACT Us

PARENT RESOURCES
SUPPORT BERKSHIRES

Ramah Scenes


News **חדשות**
REUNION #1 Details - CRB
Family Day at MSG
September 10th
[Click here](#)

CAMP VIDEO

WATCH NOW





- UPDATE PERSONAL PROFILE
- SEARCH ALUMNI DATABASE
- MESSAGE BOARD
- DONATE
- REFER A FRIEND
- EVENT CALENDAR
- UPDATE PROFILE PHOTOS
- LOGOUT



Curious about what's going on with camp?
LEARN ABOUT DEVELOPING PROJECTS

Alumni

אנשי

Add your information and click "Update My Profile". Please complete as much information as possible. Take note of the check boxes next to the fields. If you check these boxes, your information will be available on-line, and will be viewed by other *Ramahniks*. Please note that any field marked with an asteriks (*) is required to complete your profile.

| Name and Camp Information | Home Address & Family Info. | Personal Information | Other Addresses | Volunteer Preferences |
|---------------------------|-----------------------------|----------------------|-----------------|-----------------------|
|---------------------------|-----------------------------|----------------------|-----------------|-----------------------|

Name and Basic Info

First Name*
 Middle Initial
 Last Name*
 Title
 Camp Nickname
 Maiden Name
 Date Of Birth
 Gender
 Primary Email
 Password*

ALUMNI

Login or Join
Donate

ABOUT
SHALOM SCHOOL

ADMISSIONS

SCHOOL LIFE

SHALOM FAMILY

SUPPORT SHALOM

RESOURCES



Support Shalom School



You can help Shalom School continue as a special place for Jewish children, and help us to enhance the experience and offer it to more people. Thank you for your support.

NOTE: Credit card information is required to ensure your credit card is securely and properly processed. This information is solely used for the processing of the credit card and is not stored on our system.

Shalom School is a charitable organization under section 501(c)(3) of the IRS Code. Tax ID: #600144192

Donation

Amount of Gift*

Designation of Gift* Annual Campaign

Contact Info

If you have already registered for the alumni portal, please [login here](#), then you will be redirected to this same form but won't have to re-enter your information.

First Name*

Last Name*

Home Address*

Home Address 2

City*

State/Province*

Postal Code*

Country

Credit Card Information

Name on card*

Type*

Number*

Expiration Month* 01

Expiration Year* 2006

In Honor or Memorial

Memorial or Honorarium

MemHon First Name

MemHon Last Name

Send Acknowledgement To

Gift Message

Submit

Back end = Back office

Administration Management Strategy



- Data Base
- Feeding Facebook
 - Enrollment
- Staff Applications
- Donations on-line
 - Alumni Portal
- Annual Fundraising



- Suggest to Friends
- Add to my Page's Favorites
- Remove from my Page's Favorites

Information

Location:
491 Lawrence Avenue West, Suite
400
Toronto, ON, M5M 1C7

Phone:
416-789-2193

Fans

6 of 644 fans [See All](#)



Howard
Allen
Goldberg



Ariela
Fuersten
berg



Lizzy
Lovinger



Dori
Tabachnick



Jamie
Kerner



Ron Burton

Photos

Camp Ramah in Canada

Become a Fan

- Wall Info Photos Discussions Events

Filters



Camp Ramah in Canada



Kayitz Alpayim vTesda

138 new photos
 September 6 at 1:48pm · Share



Camp Ramah in Canada



Kayitz Alpayim vTesda

62 new photos
 September 6 at 12:30pm · Share



Quinn Halman how many more days until kayitz '10?

September 3 at 1:19pm · Report



Camp Ramah in Canada We won't know until we set our dates for next year!
September 6 at 5:54pm · Report

welcome back to
THE BUZZ
WHAT'S HAPPENING AT CAMP MORASHA

Tuesday, August 18, 2009

2009 FINAL NIGHT VIDEO



Final Night Video 2009 from Morasha Programming on Vimeo.

Posted by JJo at 10:21 PM 0 comments

Color War Generals

Wake up 3:00am. Buses depart immediately. Where are we going!? What's going on?! Breakout at the Movies!

Best PreShabbat Video?

| | |
|---------------------|----------|
| Week 1 | 2 (10%) |
| Week 2 | 1 (5%) |
| Week 3 | 1 (5%) |
| Week 4 | 0 (0%) |
| Week 5 | 2 (10%) |
| Week 6 | 0 (0%) |
| Closing Night Video | 13 (68%) |

Votes so far: 19
Poll closed

The Morasha Blog

The Buzz is the official blog of Camp Morasha. It will keep you up to date with what's going on in camp so that you can stay connected no matter where you are. Contact the editors at MorashaProgramming@gmail.com or click [here](#).

Camp Morasha Website

Visit the official website at CampMorasha.com

Time



Google groups



CYJMidwest_Board

Home

 **Discussions** 7 of 192 messages [view all »](#)

[CYJ Board List](#)

By Rona Elder - Oct 1 - 1 author - 0 replies

[Minutes for CYJ Board Meeting](#)

By Rona Elder - Oct 1 - 1 author - 0 replies

[WHAT is Camp???](#)

By Nitza Zisook - Sep 29 - 1 author - 0 replies

[Full Board Conference Call Tuesday October 6, 2009 7pm Central/8pm Eastern](#)

By Marcie Bachrach - Sep 28 - 3 authors - 2 replies

[Apologies](#)

By Nitza Zisook - Sep 24 - 1 author - 0 replies

[Reports for the meeting on October 6](#)

By Dale Marcus - Pres. Great Plains Region - Sep 22 - 2 authors - 1 reply

[Ashley Flores](#)

By Abigail Sivan - Sep 22 - 1 author - 0 replies

 **Pages** 2 of 4 pages [view all »](#)

[Grinspoon Docs-New Logo](#)

Last updated by amyhamerm...@gmail.com - Apr 29 - 1 author - 1 page long

[2a%2520CampRegionMapUSA.pdf](#)

Last updated by amyhamerm...@gmail.com - Apr 29

 **Files** 1 of 24 files [view all »](#)

[1VisionPlan.pdf](#)

Last updated by amyhamerm...@gmail.com - May 11

Google groups



CYJMidwest_Board

March 8, 2009 Board Meeting Documents to download

Here you will find links to all the documents referenced in our meeting on Sunday, including all the PowerPoint slides that were used. Click on each item below and the documents will download to your computer.

[The Breeze Powerpoint](#)

[PDF Printout of LaDallman's PowerPoint](#)

[December 7, 2008 Minutes](#)

[Talking about CYJ](#)

[Development Report](#)

[Board Giving FAQs](#)

[Site Report](#)

[Alumni Report](#)

Version: ▼

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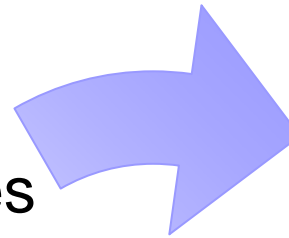
What do we need to do?

Answer these questions:

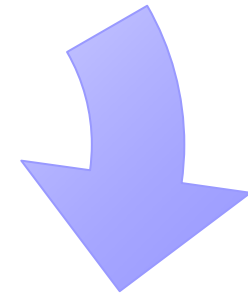
Implementation



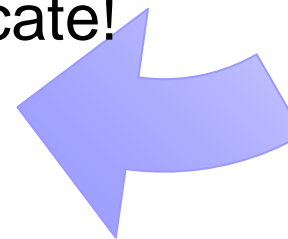
Who does
what?



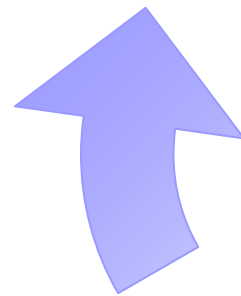
Collect
Clean Data



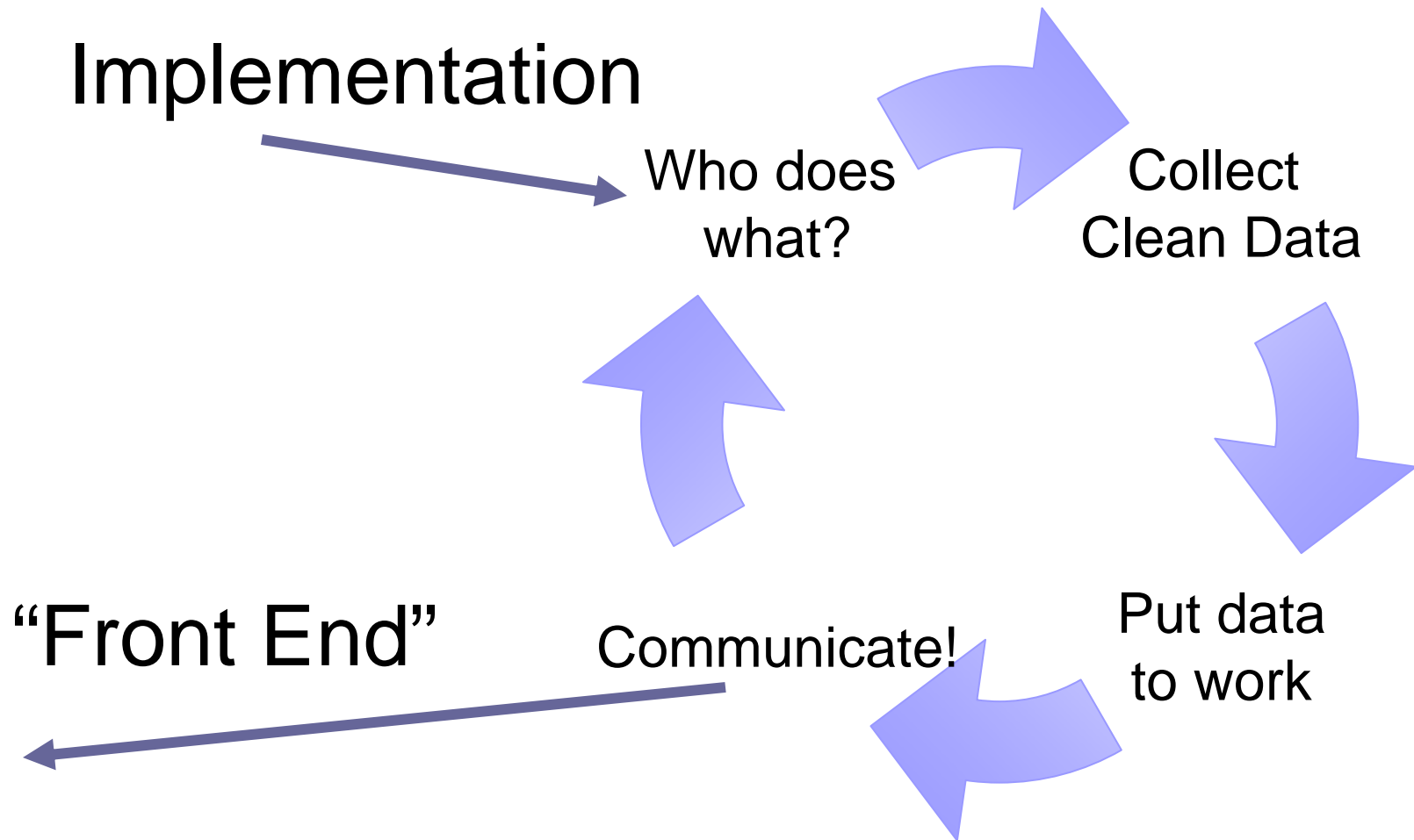
Put data
to work



Communicate!



Answer these questions:





Pledge Details

Pledge ID

Pledge Date

Total

No. of Pymts

Frequency

General Ledger

Initial Payment

Thank-you #

Associated Address

Write-off Amount

Balance Due

Last Paid Date

Start Date

Billing Amount

Reminder?

Solicitation

Sub Solicitation

Campaign

Write-off Date

Delinquent Amount

Last Date Billed

Gift Memo

Planned Gift

Planned Gift Yes No

Anonymous Yes No

Planned Gift Type



Planned Giving Information

Planned Giving
Notes

Assigned
Contact

Next of Kin

First Name

Relationship to Donor

Address

City

Zip

Email

Last Name

Phone #

Address 2

State

Links to Next Kin Yes No

Donor Estate Advisor/Planner

First Name

Role

Address

City

Zip Code

Last Name

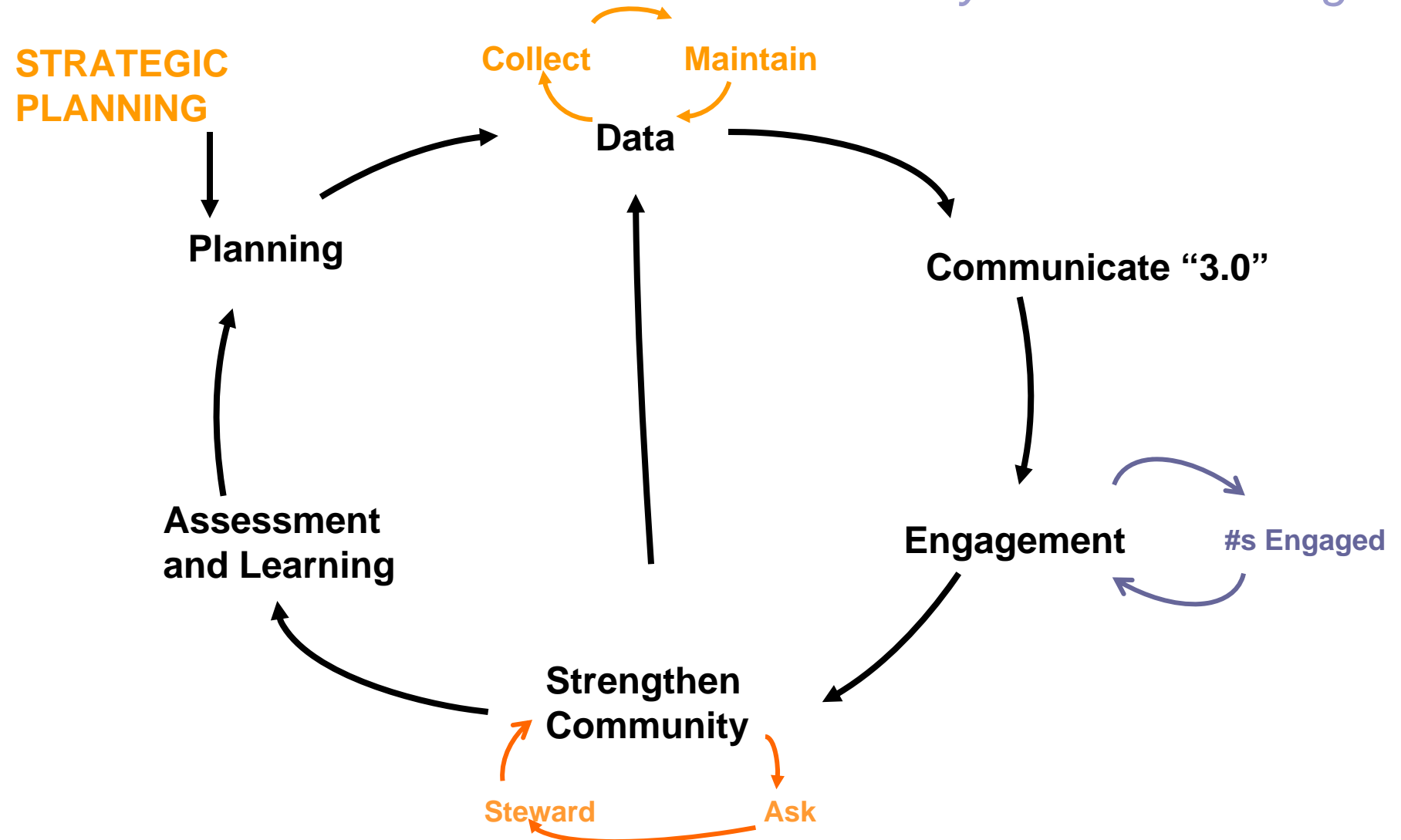
Phone Number

Address 2

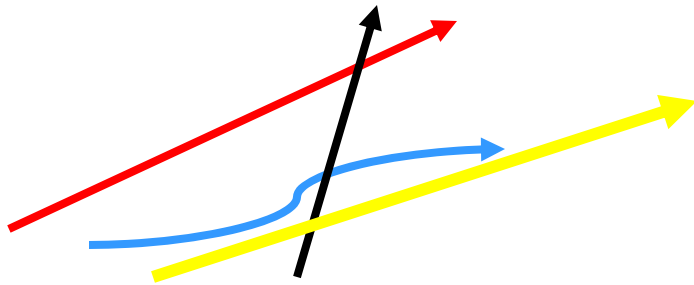
State

Email

Tech Plan: *accelerates our ability to achieve our goals*



The Grinspoon Tech Assessment



Tech today



Time

(one year)



How do we get a Tech Assessment?



contact kevin@gijp.org

For More Information

- You can find this presentation on our web page.
- Tech Program Blog:
<http://blog.gijptech.org>
- GJJP eNewsletter Archives:
<http://enewsletter.gijptech.org>