



Ohio Nonprofit Technology & Communications Summit

September 30, 2016

Huntington Convention Center of Cleveland

Thank you to our
Presenting Sponsor



Presented in partnership with
The Fathom Gives Program.

Welcome

Technology is an integral part of everything we do. Today's Summit convenes national and local technology, digital marketing and communication experts to help you put technology to greater use for your nonprofit.

Enjoy your day. We know you will find it informative and valuable.

What you need to know

1. Our wireless password for today is **#BVUtech16**
2. **Mingle:** Our presenters, BVU staff and Fathom experts will be available to answer any questions you have. Please feel free to "Ask Us Anything."
3. **Lunch:** Boxed lunches will be available at 12:00 pm in the Exhibit Hall.
4. **Breaks:** All breaks are 15 minutes. Cookies will be served after the first breakout session.
5. **Feedback:** As we plan for educational seminars throughout the year and for the 2017 Tech Summit, we need your feedback. BVU staff will be outside the third breakout session to collect your feedback surveys and provide you with a drink ticket for the reception.
6. **Reception:** Stay for the reception where you will have an opportunity to mingle with presenters, BVU staff and Fathom experts.
7. All breakout session presentations and notes will be available at **BVUtech.org**.

Win an Amazon Echo

Visit with at least six exhibitors, fill your punch card and be entered into a drawing to win an Amazon Echo (and other prizes).



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Agenda

8:00 – 8:30 am

Registration/ Exhibit Hall

8:30 – 12:00 pm (break at 11:00 a.m.)

Plenary

Speakers:

Beth Kanter, Master Trainer, Author, and Blogger

Jeff Leo Herrmann, Chief Strategy Officer, Fathom

Leon Wilson, Chief Technology & Information Officer, Cleveland Foundation

Linda Widdop, Director of Technical Service - IT Services, TechImpact

Kathryn Svobodny, Program Director, TechSoup

Karen Graham, Executive Director, Idealware

12:00 – 1:00 pm

Lunch and Exhibit Hall

1:00 – 2:00

Breakout Session 1

2:15 – 3:15

Breakout Session 2

3:30 – 4:30 pm

Breakout Session 3

4:30 – 6:00 pm (raffle at 5:15 pm)

Networking Reception/Exhibit Hall

#BVUTech16

Use and follow the hashtag **#BVUTech16** for information about today's Summit and to engage with other attendees.

BVUvolunteers.org

@BVUvolunteers



Plenary

Become a Networked Nonprofit: Leading on Social Platforms

Beth Kanter

Master Trainer, Author, and Blogger

Bay Area, San Francisco

Beth is an internationally recognized thought leader in networks, social media, and data. Beth has over 35 years working in the nonprofit sector in capacity building. She is author of the award winning *Networked Nonprofit Books* published by J.Wiley and is currently working on her next book, *The Happy Healthy Nonprofit: Impact with Burnout*.



Use Data and Analytics to Better Communicate with Your Audience

Jeff Leo Herrmann

Chief Strategy Officer, Fathom

Cleveland, OH

Jeff serves as Chief Strategy Officer for Fathom, where he is the champion of Fathom's growth, innovation strategy and new business. Prior to Fathom, Jeff spent 15 years at the Nielsen Company in audience measurement and advertising effectiveness.



Funding Technology from the Funder's Perspective

Leon Wilson

Chief Technology & Information Officer, Cleveland Foundation

Cleveland, OH

Leon Wilson serves as the Chief Technology & Information Officer for the Cleveland Foundation, focusing on strategic initiatives that will help position the foundation as a leader in the use of technology in all areas of its work. In addition, Leon is also responsible for helping to develop and implement an external Cleveland Foundation technology strategy that will focus on elevating Cleveland to become a recognized leader in technology, particularly in the areas of digital equity and inclusion, cyber security, and big data.



Plenary Notes:

Plenary

Cloud Solutions: How They are Transforming the Way Nonprofits Work

Linda Widdop

Director of Technical Services, Tech Impact
Philidelphia, PA

Linda has over 20 years of experience in technology. She currently leads client relations for Tech Impact, a nonprofit dedicated to nonprofit adoption of sustainable technologies and business processes. She frequently presents in the nonprofit community with local, national and global partners. Linda, together with her team, has propelled hundreds of nonprofits around the world to realize the potential of technology to achieve their mission and improve outcomes.



TechSoup: Leveraging Product Donations and Services

Kathryn Svobodny

Program Director, TechSoup
San Francisco, CA

As a Program Director for TechSoup Global, Kathryn is responsible for developing new scalable technology solutions and services for the nonprofit sector. Currently she is the program manager for TechSoup Boost, TechSoup's new subscription service.



Idealware: Making Smarter Technology Decisions

Karen Graham

Executive Director, Idealware
Minneapolis, MN

Karen serves as Idealware's executive director, where she leads a team of researchers, presenters, and writers who create technology information resources designed to help nonprofit leaders put their vision into action.



Plenary Notes:

Breakout Sessions

Breakout session presentations and notes will be available at BVUtech.org.

Session 1 (1:00 – 2:00 pm.)

How Happy and Healthy Nonprofits Use Technology to Increase Impact Without Burnout – Room 25A

Are you happy? Are you healthy? Is your organization happy and healthy? Learn tools and techniques using technology that will help you (and your nonprofit) avoid burnout and be more effective. Ideas will be shared from Beth Kanter's upcoming book, [The Happy Healthy Nonprofit](#), co-written with Aliza Sherman and to be published by Wiley in early 2017.

Presented by Beth Kanter

Build an Audience & Move Them to Action Through Social Media – Room 25B

It's not enough to simply have a social media presence. To be successful on social media, a nonprofit should find the right audience, consistently provide them with content that really speaks to them, ultimately move them towards action - and then do it all over again! Panelists will provide tips and tactics to make social media work for your nonprofit.

Presented by Fathom Digital Marketing Experts: Jennifer Frates, Jennifer Marini Garvin and Rob Hosler

Overview of Cloud Technologies for Nonprofits – Room 25C

Nonprofit leaders must understand how to leverage the cloud to improve productivity and reporting while lowering expenses. Cloud technology will help you achieve both. We will start with an overview of the "Cloud" - the technology behind the scenes and why nonprofits are well positioned to take advantage of cloud solutions and benefits, and describe and explain any risks. Then, we'll talk about free to very low cost cloud-based productivity solutions, CRM, and infrastructure platforms for nonprofits.

Presented by Linda Widdop, TechImpact.

What Digital Marketing Analytics Matter Most to Nonprofits? – Room 19

As a nonprofit, you may be looking for the most effective ways to track the success of your marketing initiatives on your site. Google Analytics makes it easy (and is free) to get insights into the acquisition channels and activity of your users. But just installing GA isn't enough; you need to know what you're looking for, and you need to make sure your data is correct. Panelists will dive into the most important metrics you should be keeping an eye on, as well as provide information on proper implementation and the common mistakes of Google Analytics users.

Presented by Fathom Digital Marketing Experts: Cliff Karklin, Joe Loar and Melissa Mathews

Breakout Sessions

Breakout session presentations and notes will be available at BVUtech.org.

Session 2 (2:15 – 3:15 pm.)

Make Smart Software Decisions– Room 25A

With dozens of options for database software, features and pricing plans to sort through, how do you choose the right system for your organization? Learn how to select your software with confidence using a proven process. Learn how to evaluate your organization's needs, assemble a software selection team, sort through your options, review and test the software, and manage a smooth implementation. Whether you are considering your very first case management or donor management system, or you hope to switch in the next year, you'll save yourself a lot of headaches by following these best practices.

Presented by Karen Graham, Idealware

Efficient Budgeting Strategies for Paid Advertising Success – Room 25B

Paid advertising can be an effective tool to raise awareness of your cause, which can lead to more donors and volunteers. Use of Adwords and Bing campaigns can reap heavy returns for your nonprofit. Learn best practices and tips in efficient budgeting for Adwords and Bing campaigns. Our panelists help you explore where to spend your advertising dollars, budgeting, setting target metrics and tools for forecasting monthly expenditures.

Presented by Fathom Digital Marketing Experts: Matt Brown, Sam Rusell, Ashley Long and Tyler Baltzell

The Changing Role of IT Staff – Room 25C

As nonprofit organizations adopt cloud for basic productivity and database needs, the role of the "technology staff" must shift. Today, IT staff must engage with management and users to understand business needs and manage systems rather than hardware. We will discuss this changing role and how nonprofit leaders can prepare to successfully manage the new IT landscape, and the responsibility of managing data sources, understanding data integration and how this can affect the organization.

Presented by Linda Widdop, TechImpact

Grow Into Technology – Room 19

Adopting new technology into your existing fundraising campaign doesn't mean abandoning what works. Introducing *technology* to refresh existing campaigns and take them to a new generation can be a good way to grow internal aptitudes, grow into new strategies organically and inspire a new mindset.

A moderated panel will provide specific examples from their own organizations to discuss employing new technology to support existing campaigns. They will focus on how technology has helped them raise more money, acquire new donors and/or realize operational efficiencies for long-running campaigns that were previously "low-tech".

Presented by Ron Cass, Big River Online. Panelists Sara Thomas from Cleveland Hearing & Speech Center, Monica Lloyd from Shoes & Clothes for Kids, and Ryan Strine, Case Fund - Case Alumni Association

Notes

Lined area for taking notes, consisting of 20 horizontal lines.

Breakout Sessions

Breakout session presentations and notes will be available at BVUtech.org.

Session 3 (3:30 – 4:30 pm.)

Social Impact, Accelerated: How Your Nonprofit's Back Office Can Change the World – Room 25A

Nonprofits operate in a world of significant complexity and limited resources. Whether it is the continuous friction between the fundraising and accounting departments around actual revenue and delivering a superior donor experience or trying to link outcomes with the true cost of programs, nonprofits regularly struggle to accomplish their mission under increased pressure to spend more on programs and less on the back office. Learn how your nonprofit can leverage future-proof technology and leading practices to achieve higher performance and increased innovation, all while bridging the gap between your fundraising and accounting teams.

Presented by David Geilhufe, Senior Director of NetSuite.org

Nurture Marketing: Let's get personal! – Room 25B

Who comes in first? The nonprofit with the best relationships with their donors! Are you engaging your audiences on a personal level or do you feel like it's a one way conversation? Achieving personalized communication can build lasting relationships and improve donor support. In this session, you will learn tactics to improve online relations with supporters and engage them in ways that are more meaningful to them and your mission.

Presented by Fathom Digital Marketing Experts: Abby Dunn, Jherod Bauders, Mickey Haba, and Jeff Herrmann

Data Visualization – Room 25C

Outcomes, outcomes, outcomes. We hear this from our funders, board and community. We may be collecting data about our programs but we may not be able to turn raw data into powerful information that our nonprofit can use. We will outline the best tools and practices to help your nonprofit prepare and use its data to turn information into actionable knowledge. Today's Business Intelligence tools can help you extract key information from your data by looking at it from various perspectives, while demonstrating the best data visualization tools available for nonprofits.

Presented by Sara Thompson, TechImpact

Keep Up with the Demands of IT Security on a Nonprofit Budget – Room 19

The technical requirements facing nonprofits are challenging and complex due to budgetary constraints and the demands for secure and reliable access to data regulators, clients, donors, and board members. We will explore different tools nonprofits can leverage to obtain better IT security practices that won't break your IT budget. These include cloud based anti-virus solutions, Intrusion Detection and Prevention Systems, and data backup in the cloud. Additionally, you will learn how tools built within Office 365 (available for free to qualified nonprofits from Microsoft), such as Email Encryption and Mobile Device Management, enable nonprofits to operate more efficiently and securely.

Presented by Brandon Shaw and Mary Donnelly, Encompass Group, LLC

Exhibitors

Win an Amazon Echo

Thank you to our 2016 Nonprofit Technology and Communications Summit exhibitors. This Summit would not be possible without their support! Connect to these exhibitors all year long by visiting **BVUTech.org**.

Visit with at least six exhibitors, fill your punch card and be entered in a drawing to win an Amazon Echo (and other prizes).



The Association of Fundraising Professionals Greater Cleveland Chapter is dedicated to elevating the fundraising profession, providing valuable educational programming to our members, and serving the community by promoting ethical and professional practices in philanthropy. afpcleveland.org



Big River Online provides a suite of nonprofit fundraising solutions including online fundraising pages, online giving catalogs, crowdfunding, drive fundraising and team fundraising. All of its applications are built on a proprietary platform that supports configuration over customization, which means organizations enjoy incredible flexibility without the risk and expense of a custom-built solution. It integrates easily with existing websites, email marketing solutions and databases, allowing nonprofits to leverage existing investments. gobigriver.com



The Mission of Cleveland GiveCamp is to pair creative and technology talent with nonprofits in need. GiveCamp is a weekend-long event where software developers, designers, database administrators, project managers, and creative professionals donate their time to create software and web-based applications for nonprofits. The only limitation is that projects must be completed in a weekend. Cleveland has the largest GiveCamp in the nation. Past projects include: Client data-collection applications, Websites, Mobile phone applications. clevelandgivecamp.org



BoardMax simplifies board administration and boosts board member engagement. Our comprehensive board solutions allow users to centralize all board-related materials, such as agendas and board books, providing 24/7 secured-access from multiple devices. estreamlinksoftware.com



Cureo is a web-based collaboration platform for non-profits. It allows employees, volunteers, supporters and board members to create workspaces, share files, conduct conversations, manage tasks, publish content, and share calendars. What's unique is that the platform creates community among organizations so that like-minded individuals can collaborate on joint initiatives. Cureo is easy, mobile-friendly, and accessible from anywhere. Visit us at cureo.com. **cureo.com**



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enCompass Group is a team of business and compliance technologists providing managed IT services and support to regulated organizations, with a concentration on the Financial Industry, Healthcare, and Nonprofits. With industry reliance on technology, and the demanding nature of compliance and regulation, we work to exceed our client's expectations with every interaction by pledging an Exceptional Client Experience. Based out of Cleveland, Ohio, we are the best choice in IT Services for regulated businesses nationwide.



Fathom is a full-service digital marketing agency for transformation minded marketers looking to punch above their weight. With experience in connecting business strategy and strategic marketing solutions, Fathom helps modern marketers to navigate change, calibrate increasingly integrated sales and marketing departments, and restructure to better support their businesses. Fathom is headquartered in Cleveland with offices in Columbus and Chicago. fathomdelivers.com



Grants Plus has helped nonprofits across the U.S. raise more than \$70 million in grant funding. Seventy-four percent of the proposals we submitted for our clients last year resulted in funding. Our grant seeking team delivers customized services to assist organizations in winning grants, including proposal writing, research, strategy, and office management. Focused on more than just dollars in the door, we pride ourselves on leaving clients more skilled and savvy to get grants on their own. grants-plus.com



Hilltop Technologies provides total solutions in telecommunications for Avaya and ShoreTel and Hosted VoIP solutions with our Hilltop Infitum offer. Hilltop has been an Avaya business partner, Avaya certified since 1999. Our ShoreTel partnership began in April 2010. Hilltop Technologies can help your business with VoIP telecommunications products, Cloud, call center applications as well as local and long distance SIP network services solutions. With our experience in telecommunication solutions, you can be assured your needs will be met at the highest level. hilltoptech.com



ShareBase by Hyland is a cloud-sharing platform that provides secure document sharing and collaboration capabilities, while ensuring that your organization retains ownership and control of its content. Users can share both internally and externally empowering them to determine the appropriate rights/privileges without adding another administrative burden to your IT staff. ShareBase is hosted in proven data centers, specializing in document management and allowing you to know exactly where your documents reside. sharebase.onbase.com



Idealware, a 501(c)(3) nonprofit, provides an authoritative online guide to the software that allows U.S. nonprofits—especially small ones—to be more effective. By synthesizing vast amounts of original research into unbiased and approachable information, Idealware helps nonprofits make the most of their time and financial resources. We have both wide and deep expertise in the software available to nonprofits, with articles, reports, and training on more than 50 different areas of software. We combine traditional research techniques such as interviews and surveys with software selection methodologies and package our findings into approachable, practical training and courses. Idealware.org



NetSuite is a unified business management system. The cloud-based platform integrates financial management, CRM, eCommerce, enterprise resource planning (ERP), inventory management and more. NetSuite.org is NetSuite's corporate citizenship program that offers a software grant and deeply discounted pricing to nonprofits in an effort to leverage this powerful platform to drive social impact. netsuite.com



Solupay is committed to delivering nonprofits with simple and secure payment solutions, making clients more efficient and secure every day. Our Built for NetSuite native integration is just one way we demonstrate our continuous investment in advanced payment technologies for credit and debit card payments. We fully support a variety of features including Interchange Management, Level III Purchasing Card Support, Advanced Fraud Management with our 3D Secure Advanced, Dedicated Relationship Management and much more. solupay.com



Tech Impact is a nonprofit whose mission is to empower communities and nonprofits to use technology to better serve our world. We are the place nonprofits can call to make sense of anything from large-scale technology projects to technology maintenance and support. We have partnered with hundreds of nonprofits organizations around the world since 2003, helping each one realize the potential of technology to achieve their mission and improve outcomes. techimpact.org



TechSoup provides technology solutions and services to nonprofits to make smart decisions about technology. We also provide nonprofit organizations access to donated and discounted software, hardware and training. techsoup.org



Since 1946, **Warwick Communications** has been helping businesses improve communications by tailoring platforms and applications to meet the specific needs of the business. We take the time to understand our customer's technology environment and pain points before recommending a solution. Warwick has been an ever-present, reliable partner throughout the evolution of communications technology. With thousands of installations, Warwick is one of the most experience and knowledgeable providers of voice solutions and IT managed services. warwickinc.com

This Summit would not be possible without the support of our sponsors and partners. Thank you!



SCOT LOWRY
PRESIDENT & CEO, FATHOM

“Fathom was thrilled to partner with BVU for the Summit for multiple reasons, chief among them that serving the Northeast Ohio community is central to the company’s philosophy. One prominent example of this philosophy is seen in the ‘Fathom Gives’ program, where every quarter, Fathom people have the opportunity to volunteer as a group for a coordinated local initiative. This Summit is the perfect illustration of the kind of engagement the organization—and ‘Fathom Gives’—values. Many jumped at the chance to attend this event and talk technology and marketing with their peers in area nonprofits.”





engage businesses... strengthen nonprofits... promote volunteerism

BVU can help strengthen your technology and communications

Add the Right Skills to Your Board

BVU's **Board Matching Program** provides nonprofit boards with access to business professionals who are trained and referred based on each nonprofit's need for particular skills and each candidate's interests. Please contact Julie Clark at jclark@bvuvolunteers.org to learn more. *This service is open to all nonprofits. Membership is not required.*

Engage a Pro Bono Consultant

BVU's **Pro Bono Corps** connects nonprofits with a business professional to tackle a high-impact, skill-based project at your nonprofit. We can connect you with a volunteer consultant for a database evaluation, technology roadmap and other technology related projects. Please contact Judy Tobin at jtobin@bvuvolunteers.org to learn more. *Up to 20 hours of consultation are included free with nonprofit membership.*

Upcoming seminars

Forum with Cuyahoga County

Executive Armond Budish

Wednesday, November 02, 2016

Millennials to Matures: Engaging

Different Generations Online

Wednesday, November 16, 2016

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