

Operations Software Selection Email-based Training

Orientation

YMCA of the USA
Technology Resource Group



Acknowledgements

The Technology Resource Group would like to acknowledge the generous contributions of the following individuals and organizations to the concept, design, and content of this training:

- Much of the content in this training was provided by NPower and adapted from their signature course, *Technology Strategies for Nonprofit Leaders*. As a nonprofit committed to helping other nonprofits use technology to better serve their communities, NPower encourages organizations like the YMCA to use the materials and tools they have developed, which may be freely shared among nonprofit organizations. Learn more about NPower at www.NPower.org, or visit their online technology planning tool, TechAtlas, at www.techatlas.org.
- Additional content and other elements were adapted from *Wired for Good* by Joni Podolsky (March 2003, \$35, Paper) by permission of Jossey-Bass /A Wiley Imprint. More information on *Wired for Good* is available at the following web site: <http://www.josseybass.com/WileyCDA/WileyTitle/productCd-0787962791.html>
- The email-based format of this training was adapted from a model originated by Ken White, Y-USA Network Consultant, for Board Development training. We thank him for assistance.

Welcome

Welcome to the Operations Software Selection (OSS) Email-based training. This training will introduce you to the process, concepts, and tools of selecting an operations software application for your YMCA.

Important Note: This email-based training is intended to provide you only with a high-level understanding of the OSS process. You will complete the majority of tasks described in the training with the assistance of a consultant and with other YMCAs in your group.

Training Overview

We have designed this training to be completed in a group setting. In other words, you will be taking this training along with other YMCAs and will share assignments and participate in discussions using a web site created specifically for your training group.

Course Outline

This training consists of an orientation (what you are reading now) and four sessions. Each session will be delivered to you each Monday for the next four weeks. Each session is sent as a PDF file attached to an email just as you received this orientation. Each session should take no longer than one hour to complete.

For each session, you will complete the following three items:

1. Read the PDF file.
2. Complete the session exercises and post your answers to one of the exercises on the web site to share with the group.
3. Post feedback on another participant's submission.

Homework and feedback should be completed before you receive the next session on the following Monday. In order to receive credit for the course, you must complete all three pieces for each session.

Note: You will also need to complete an assignment for this Orientation, which is explained later.

Course Credit

Upon successful completion of this training, you will receive a Certificate of Completion and will be eligible to attend the second group meeting of the OSS process. Graduates will be announced at the second meeting. This training will also serve as a prerequisite to any future technology planning trainings offered by TRG.

Course Content

This training covers the following concepts:

Orientation

- A course overview and explanation of the web tool you will use to complete the training.

Session 1 – Introduction to Operations Software Selection (OSS)

- Outline of steps
- Technology Planning
- Strategic vs. Operational planning

Session 2 – Forming a Technology Team

- What is a Technology Team
- Technology Vision Statements

Session 3 – Assess Current State and Understand Possibilities

- Assessing your current technology and business practices
- Understanding what is possible with technology

Session 4 – Making the Decision

- Choosing the operations software that is right for you
- Scripts, vendor demos, selection process
- Next Steps

Moderators and “Flies on the Wall”

- *Moderators* monitor homework, discussions, and provide you with assistance, if necessary. The moderator is typically a Y-USA staff person. One moderator is assigned to each training group. The moderator’s contact information was included in the Welcome email you received when you registered.
- *Flies on the Wall* are individuals who serve as informal faculty. These people may, from time to time, post replies or comments on the Sharepoint site. They may also address questions about content and ideas. As observers, they are familiar with the OSS content and the training medium. “Flies on the Wall” may be past participants or Y-USA staff.

Using Sharepoint Team Services

In order to communicate with the rest of your training group, you will use a web tool from Microsoft® called Sharepoint™ Team Services. Sharepoint is a web site that allows your group to post documents, engage in discussions, complete surveys, and more. For each session, you will have one assignment that you will post on the Sharepoint site to share with the group. You will also view the assignments of others and comment on them using the site.

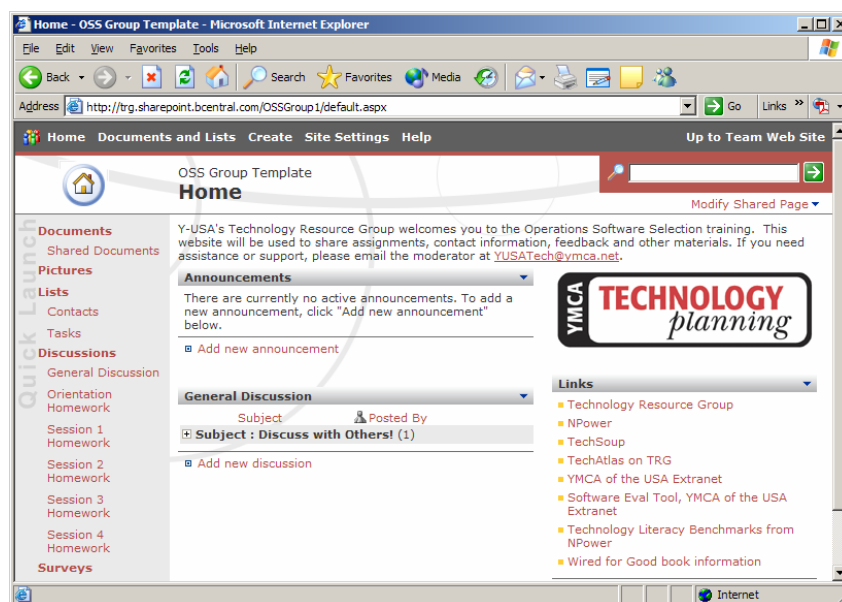
Your Assignment

Your first assignment is to visit the Sharepoint site and complete several tasks. Please make sure you complete this assignment before you receive Session 1 of the training. Follow the steps below.

1. Access the Sharepoint web site

1. Find the Welcome email you received that contains your Sharepoint username, password, and the link to the site.
2. Click on the link in the email to go to the site.
3. Enter your username.
4. Enter your password.

You should now be on the Sharepoint homepage where you will see the YMCA Technology Planning logo. In the title bar at the top of the window, you will see your OSS group number. Refer to the sample screen shot below.



- In the middle of the screen you will see two sections: Announcements and General Discussion. The moderator of the group will use the Announcements section to post any information that the group will need. You will use the General Discussion section to post your homework.
- On the left side is a menu of links starting with Documents and ending with Surveys. You may click on Documents at any time during the training to access documents for your reference. You will use the Survey link to complete an evaluation at the end of the training.

2. Enter your contact information to be shared with the group.

1. On the Sharepoint homepage, click the link labeled **Contacts** on the left side of the screen
2. Click **New Item**.
3. Fill in the fields you wish to share with group.
4. Click **Save and Close**.
5. In the very top left corner, click the **Home** link.

3. Create a new discussion item.

Note: You will follow these steps when posting homework assignments.

1. On the Sharepoint homepage, under the General Discussion section, click the **Add New Discussion** link.
2. Type your name in the Subject box.
3. In the Text box, type a sentence or two about yourself.
4. Click **Save and Close**.
5. In the very top left corner, click the **Home** link to return to the homepage.

4. Respond to a discussion item.

Note: You will follow these steps when posting feedback on another participant's assignment.

1. On the Sharepoint homepage, click the heading bar called General Discussion. This should open a larger area with only discussion items listed.
2. Click on the subject of the discussion item that you would like to reply to. In this case, click on the discussion item with the subject of "Discuss with Others."
3. Click the link that says **Post Reply**.
4. Type your reply in the text area.
5. Click **Save and Close**.
6. To view all discussions and responses, click the **Expand/Collapse** link.
7. In the very top left corner, click the **Home** link to return to the homepage.

Congratulations! You have completed your first assignment.

A Few Parting Tips

We want to help make your training run as smooth as possible. Please help us by following the guidelines below.

- If you are having any sort of technical difficulties or need help using the Sharepoint web site, please contact your training moderator directly. Do not post requests for technical assistance on the Sharepoint site.
- Keep in mind that your group's web site is a place for productive discussion on the topics you will read about during the training. Please make sure your feedback is constructive (no negative criticism, please!) and is focused around the concepts of the training.
- To help keep things organized, make sure you follow the instructions in each session for how to label your homework postings.
- Finally, good luck and have fun! Look for your first session next week.