Leveraging Low and No Cost Tech Tools
to Boost CLC Effectiveness
(a Consumer Action story)

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We're a specialist centre in Melbourne servicing all of Victoria with telephone advice lines for both financial counselling and legal advice, as well as a policy and campaigns team who draw on our advice and casework to inform their program of advocating for law and business practice reform to benefit all Australians. We have almost 50 staff and usually host up to 4 volunteers each week.

This session will be fairly rapid fire and I'll talk about some general concepts as well as some that are quite specific to the path our centre took but hopefully, each of you will take away at least 1 or 2 new ideas, tools or perspectives. Due to the webinar format I'll take questions in chunks and if we simply can't get to all of them during the session, I'll be sure to address them afterward via an email to all participants. Keep in mind we'll also send the handout notes so don't feel you need to write every single thing down.

Firstly, let's get a sense of who our attendees are, we have 2 questions we'd like you to answer 1) about your personal technical expertise, and 2) how well your organisation uses technology. [POLL QUESTIONS]
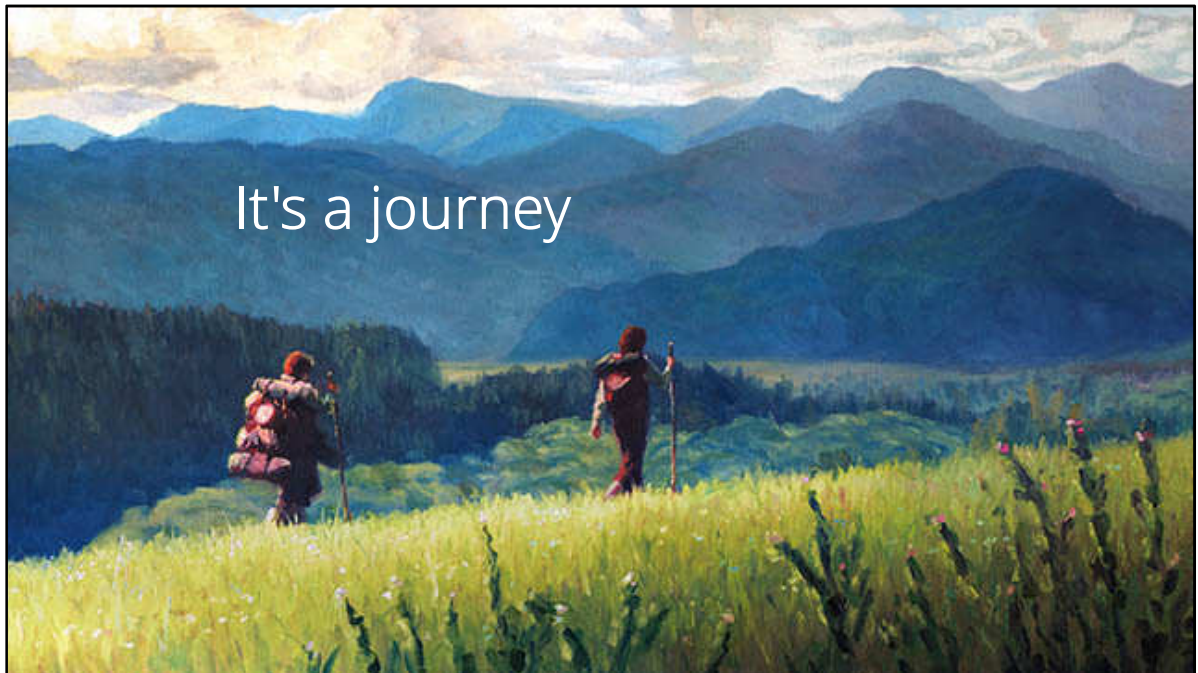
It's a journey

Improving technology at any community organisation is a journey. A journey that will take you on a winding road through the dizzying heights of Shiny Object Syndrome to the depths of Outright Mutiny, on various Wild Goose Chases and the harsh terrain of Change Management – beyond (hopefully) to a better, happier, more effective workplace. Some legs of the journey will be fast, others may take years. Maintaining a positive outlook and adventurous nature is key.

Where it starts
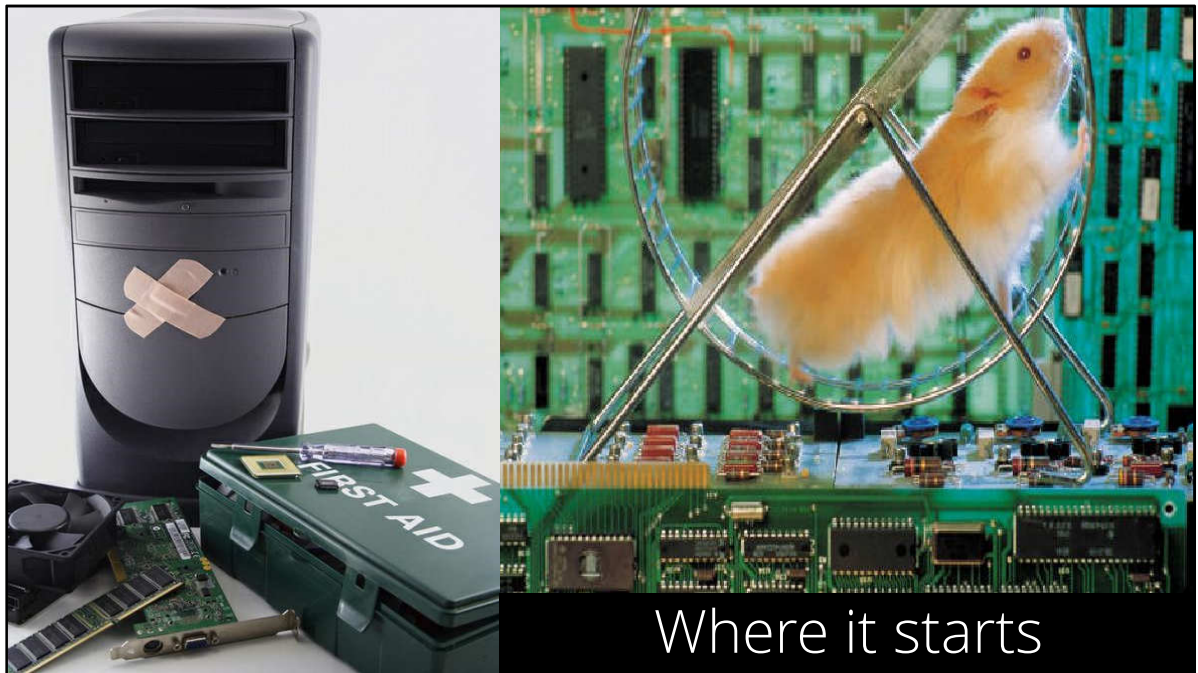
8 years ago I inherited a heavily band-aided infrastructure: a server that crashed almost daily taking us offline for at least 20-30 minutes at a time; a staff wholly disengaged with and unempowered by technology; a mish mash of platforms and applications used differently or not at all by each team; and a support team that were conspicuously absent and notoriously difficult to get a rapid response from. We needed help.

Find a co-pilot
and build a team

First things first – I admitted that I was out of my depth, there were so many complex and interrelated problems that I needed help sorting them out. For some organisations, the resources may already exist but you might need to make the case for them to get allocated to you, for others, external support might be required. For us, it was the need to find an external IT support provider willing and able to take on the day to day firefighting of our issues but also help me craft a longer term strategy to haul us out of the quagmire and impart his knowledge where possible to those willing to learn so we could manage lower level issues ourselves.

To develop any long term plan, I needed to understand what the needs of our various teams were – both immediate and horizon. We set up an 'IT team' with representatives from each department so we could ensure all issues were addressed and prioritised in a fair and logical way. The team members were not especially skilled in IT but were interested in how it could improve how they worked. They were instructed to keep the lines of communication open with their departments and the IT team so we could ensure all concerns were heard, considered and responded to so that no-one felt left out and all great ideas or insights could be captured.

Develop a strategy

When developing a strategy be sure to focus on the longer term - you can use a theory of change model if your organisation finds it helpful but whatever you do, decide where you need to go BEFORE you start thinking about which tools might help. There is no point thinking about tools before you know what your overarching strategy looks like because that way leads straight to Shiny Object Syndrome and you'll end up with a bunch of flashy looking tools that aren't necessarily right for the job.

But why change?

We're putting the cover sheet on all the TPS reports now

We all have habits that are hard to break, but this is especially true of workplaces. Often we do things the same way for years and years without ever questioning whether there might be a smarter way to do it, sometimes the solution is quite low tech and in other cases it's a blow it up situation.

E.g. **Debit Card cover sheets > stamp** (low tech, simple to implement, high satisfaction win); **change CMS** (existing functions no longer meet practice needs, better options out there but requires significant investment and change management, lots of teething issues and immediate pain, win not 'experienced' until a year or two later). I bet everyone in this session can think of something that drives everyone in your office nuts but you all do it anyway – make a note of that one thing and spend some time after this session thinking about how it could work better. Whatever you do, it's worth following some standard change management processes to ensure you bring people with you.

If you need a refresher on Change Management, Alison.com offer a free online course that takes about 2-3 hours (you can break it into smaller chunks though) - there are other paid courses via face to face training orgs or this list of online options.

Suppliers and Donors
(you don't get if you don't ask)

Get to know the donation and discount schemes available, be aware of grant programs that might support capital expenditure on infrastructure or lower cost tech investment (few and far between but they do pop up).

In Australia, **ConnectingUp** are one of the main tech suppliers and trainers to the NFP sector. All CLCs should be eligible for their discounts and donations program which covers both software and hardware including networking supplies. www.connectingup.com.au They also offer all sorts of training you may find helpful. **TechSoup** are the NZ equivalent and sometimes their training webinars might work for you as well.

Microsoft have a **donation program** for the NFP sector which is quite generous. Not only can the Office 365 cloud suite be provided for free but there is also a $5,000 annual credit available for the Azure product. They offer heavy discounts on Dynamics 365 and Power BI cloud products among others. Volume discounts are available on most other products. Google's **G-suite** is another free option.
Many suppliers offer discounted pricing for NFPs but don't advertise so I've made it a practice to always ask before buying anything.

Keep your eyes and ears open – if you see an email from a colleague or stakeholder organisation offering up free iPads or something else you can use – put your hand up quick sticks! We were lucky enough to get 5 units one of our funders was offloading so staff can easily use them for outreach which would have been really difficult before.

Don't be afraid to ask. If you need something and there's no way the budget can afford it, reach out to stakeholders and pro bono partners with bigger budgets – they just might be getting rid of something, have a surplus or have access to bulk pricing that you don't. We scored some fancy filing cupboards when an industry stakeholder was moving office that we could never have managed on our own. Make sure your whole team is aware of the 'wish list' so if they hear about an opportunity they let you know.

Office 365
– the basics
- Outlook
- Word
- Excel
- Powerpoint
- OneNote
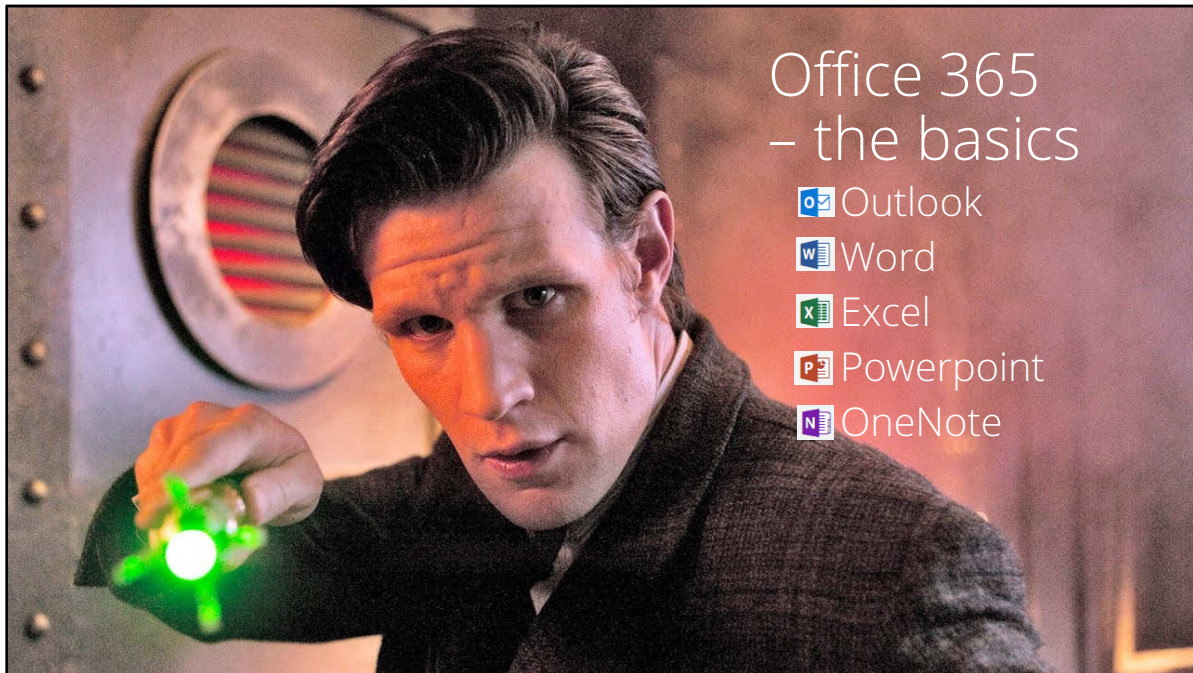
There are often comparisons between G-suite (formerly Google Apps) and Office 365, both have comprehensive offerings, however I focus predominantly on Office 365 because as a legal practice, having our data domiciled in Australia is critical and they are extremely responsive to Office 365 service requests. Other NFPs may be able to deploy G-Suite safely but for us, the data storage is critical so having datacentres in both VIC and NSW providing redundancy and security is key.

It's important to acknowledge the difference between Office Online and Office client applications (desktop/2016 etc) up front. Office Online applications have more limited functionality e.g. tracked changes are occurring but not visible, calculations in Excel may need to be manually triggered and cross sheet linking is tricky, copying in complex content such as images and videos may be difficult. The collaboration options however are significantly greater than in the desktop applications under a volume licence – if you go for the Business Premium subscription the experience is *almost* identical from a collaboration perspective.

E1 v E3 licences = free v $7/mth = hybrid deployment with a volume licence of Office 2016 v seamless online apps/desktop licence. Note that the hybrid deployment works with 2013 (and 2010 to a lesser degree) but upgrading to Office 2016 is worthwhile because Microsoft's roadmap for 2016 and 365 are on parallel trajectories at the moment. That said, the Nonprofit Business Premium isn't a bad compromise at closer to $4/mth per user (better for small to mid size orgs though) https://products.office.com/en-au/nonprofit/office-365-nonprofit-plans-and-pricing
Most people are quite familiar with Outlook, Word, Excel and Powerpoint – less so with OneNote but it's basically a note taking application on steroids.
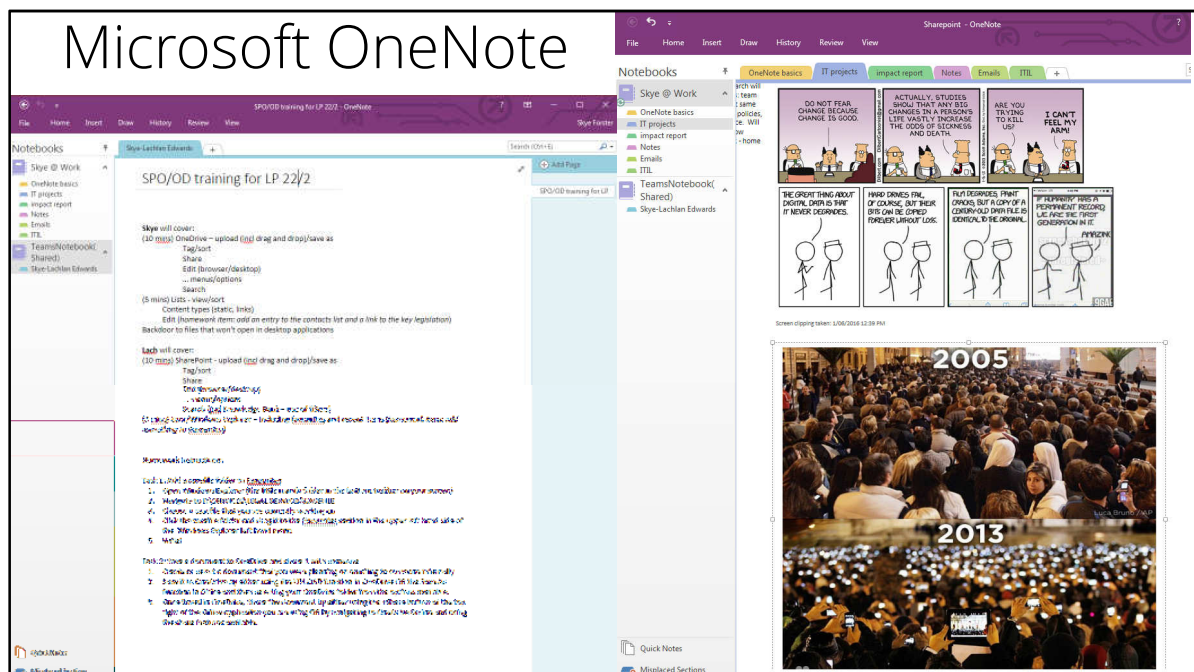
OneNote is basically a bookshelf you can fill with notebooks. Each notebook can have as many pages as you care to add and can be shared with others you might be collaborating with. You can put text, screen clippings, pictures, links and videos into Notebooks. If you have a touch screen you can even draw in them.

On the left is a basic notebook I created to share with one of our lawyers when developing our introduction to SharePoint and OneDrive training. We could both access it and make our own edits as to what was required.

On the right is part of the change management page from my SharePoint implementation notebook that I used more as a scrapbook.

Here's our co-Director of Legal Practice, Amanda Storey, explaining how she uses OneNote: https://www.youtube.com/watch?v=JopX3R1D68w

This Microsoft Office training page has some quick demos that explain how to get started better than I can: https://support.office.com/en-us/article/OneNote-training-1c983b65-42f6-42c1-ab61-235aae5d0115?ui=en-US&rs=en-US&ad=US

Admin tools

- Expensify
- IFTTT
- Trello
- waveapps
- Wrike

There are all kinds of admin tools available but some favourites are: Expensify for managing expense reimbursements; If This Then That for workflows; Trello for planning stuff (although Microsoft Planner is rapidly gaining ground); Waveapps for invoices, expenses, customer lists; Wrike for project management. The phrase 'there's an app for that' applies to almost anything. Listen to what your team complain about and search for a solution, if nothing obvious comes to mind reach out to colleague organisations to find out if they've ever had to deal with this problem.

There are also options for HR such as Employment Hero but it's really only free for the tiniest organisations.

And a site for non profits to get bulk donations or discounts – fee to join but I've heard good reports about the variety of goods available to support events/emergency supplies https://good360.org.au/

Office 365 – collaborative tools

☁ OneDrive
SharePoint
Yammer
Delve

OneDrive is basically a replacement for your personal file folder except with the ability to control shared access to those documents with individuals or groups as needed when you are working on something together.

SharePoint creates a space (or group of spaces) for teams to work together both in the office and remotely. At it's simplest it can be deployed as a replacement for a shared/networked drive, at its most complex it can be a fully functional intranet with automation and workflows built in. The level of complexity is down to what best suits your team and business practice.

Yammer is basically a series of newsfeeds built according to team or topic – it's entirely up to you how it's deployed and can be built in a way that best serves your organisation. One of the most useful Yammer Channels for me is our Tech Support channel – staff can submit their problem (ideally with screenshot and a description of what they were doing when it went wrong) and any one of the Operations team can address the matter. It is organically growing into a self serve IT support resource through the use of tags as well.

Delve is a tool that can be used as both an individual workflow manager and internal directory – you have the ability to see what you were working on most recently; what your colleagues are working on; as well as the roles played by others in your organisation and team. From an organisational perspective we use it more as an internal directory and a way to broadcast any special skills we might have so newbies can figure out who is 'the go to for what' easily, from a personal perspective I use it to figure out where I left off when I went home yesterday ☺

Making the shift from Windows File Explorer and folders within folders within folders isn't easy, but it is entirely worthwhile. My advice is to allocate an appropriate amount of time to not only consult with individuals and teams in your organisation, but also to allocate ample resources to train, retrain, and then review and revise how best to use these tools within your organisation.
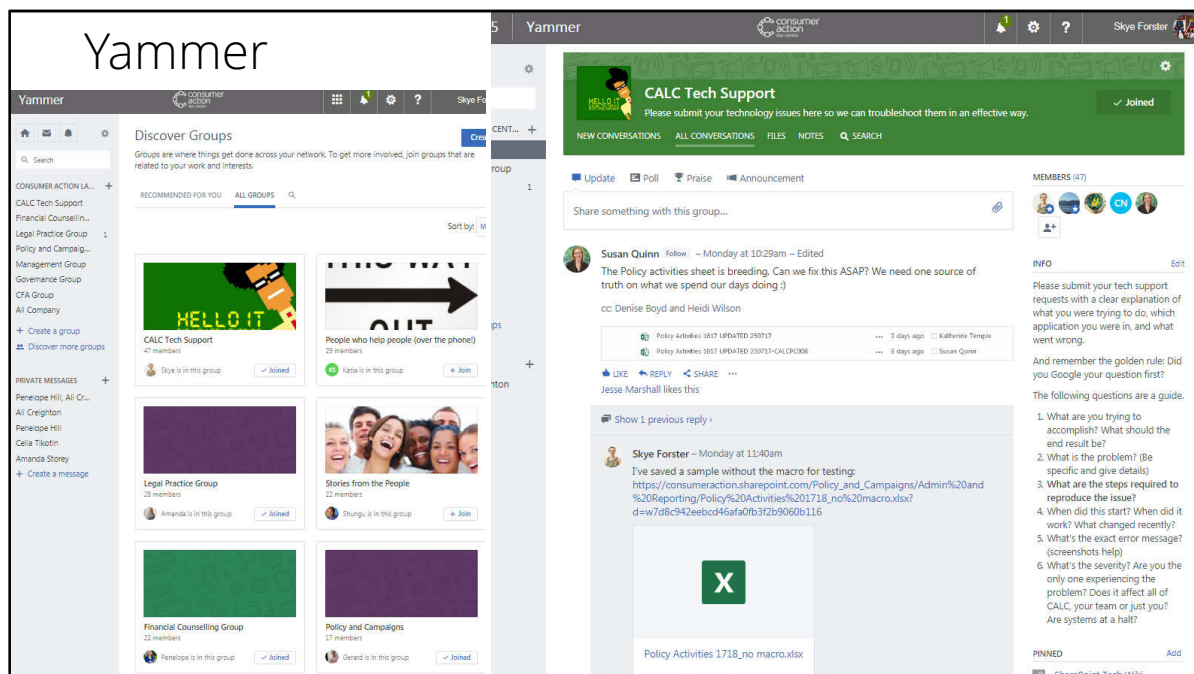
Example of our Yammer feed – The Tech Support channel is a lifesaver, channels can be created for a range of purposes, our Stories from the People one is used by caseworkers to share what they are hearing on our advice lines – good and bad.

In this video, Shungu Patsika, one of our senior financial counsellors talks about how his team use Yammer: https://www.youtube.com/watch?v=2Kf3qGmq81g

Free creative and social media tools

- Buffer
- Canva
- Pixabay
- Unsplash
- Bitly
- Adobe Creative Cloud ($)
- OBS Studio & Youtube
- HootSuite

Buffer is a great collaborative tool for managing social media

Canva is excellent for graphic design and has a modest paid model as well as a free version

Pixabay and Unsplash are both excellent resources for Creative Commons or royalty free images

Bitly is a tool for shortening rather long URLs

Adobe Creative Cloud isn't free but you can get it heavily discounted via Connecting Up and if you do a lot of inhouse publishing, it might be well worth it for your comms team

OBS Studio is an open source broadcasting program that we use to record and live-streaming videos for our Youtube channel – great for webinars because you can couple it with a private channel

HootSuite is a way to monitor and manage your various multimedia platforms there is a free version to start out but if you want more analytics or separate users you'll need one of their paid plans
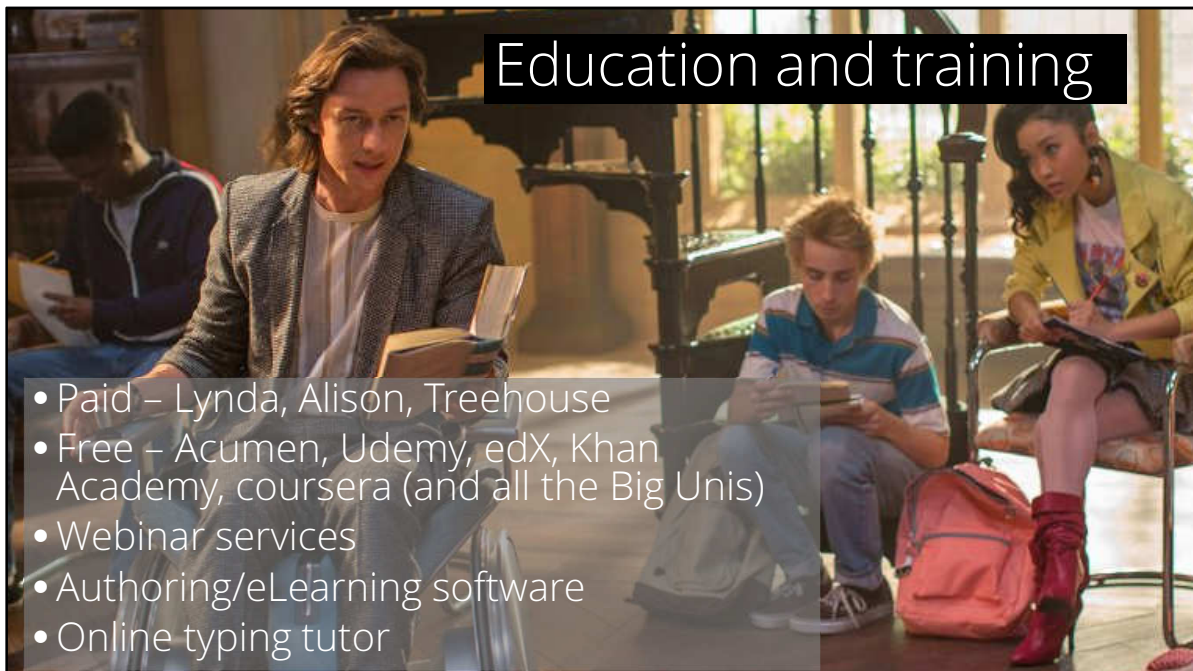
Education and training

- Paid – Lynda, Alison, Treehouse
- Free – Acumen, Udemy, edX, Khan Academy, coursera (and all the Big Unis)
- Webinar services
- Authoring/eLearning software
- Online typing tutor

Learning sites – Acumen is free, Udemy has some free courses, Lynda.com is paid but very cost effective, Microsoft Training Centre and Youtube have a squillion videos of people showing you how to do stuff

Webinar services – paid (Anymeeting and Gotomeeting) and free (Skype Meeting Broadcast, Facebook Live, Youtube Private Broadcast)

Authoring software – H5P offer a basic eLearning suite for free but most lower cost perpetual licences come in around $1500+. Some offer per user or monthly plans that may suit more modest needs. Articulate is one that offers a range of plans/modules that might work but is not the only one. There are a list of free tools here: https://elearningindustry.com/free-authoring-tools-for-elearning

Typing test and tutor - http://www.ratatype.com/typing-test/ - this offers a free typing test as well as exercises to improve typing.

Engagement and fundraising

Eventbrite of Trybooking for managing registrations for events – paid or free tickets but there are some minimal fees for paid events

DoGooder – a monthly fee but enables the type of campaign engagement where participants can quickly add their name to a form letter and by inputting their postcode have it sent to the relevant organisation/politician/company – cost varies depending on how many campaigns you want to run – just over $1000 annually gets you 5 concurrent campaigns and the ability to fundraise

Gofundme – a fundraising tool with few restrictions, they take a small percentage of each contribution made. Other options are DonorBox, CiviCRM, DonorManager & ProcessDonation

Mailchimp – a simple way to send newsletters or other bulk email. It's free until you have more than 2,000 subscribers and then it ranges from $10/month on up at a rate of roughly $5 per 200 additional subscribers

Office 365 - bells and whistles

- Planner
- Flow
- Forms
- Teams (plus add-ins like Polly)
- To Do
- Sway
- PowerApps ($)
- Power BI
- Dynamics 365 ($)

Planner is a simple project planning tool that can be powerful when combined with Project Online (paid) but alone is sufficient to manage a few smaller scale projects – very similar to Trello

Flow, Forms and PowerApps can be used to build simple and complex workflows although PowerApps is at an additional cost

Teams is like Slack – an instant messaging app that we've used to essentially replace internal email (for the most part) as well as offering an incredibly flexible space for people to collaborate.

To Do is a task list on steroids where you can set up notifications and the day's plans.

Sway is a quite simply a fancier version of Powerpoint (hot tip: great tool to record and broadcast your latest trip abroad and make the fans at home jealous!)

PowerBI is a data analytics tool and is only free for the desktop version but that may be sufficient for your reporting needs.

Dynamics 365 is a paid addition but can be used to build a CRM or CMS – in combination with the $5k Azure credit this might work well for some

Store – there are a growing number of 3rd party add ins available, obvious useful examples for legal centres are DocuSign for Word ($), employee onboarding, scheduling and helpdesk apps
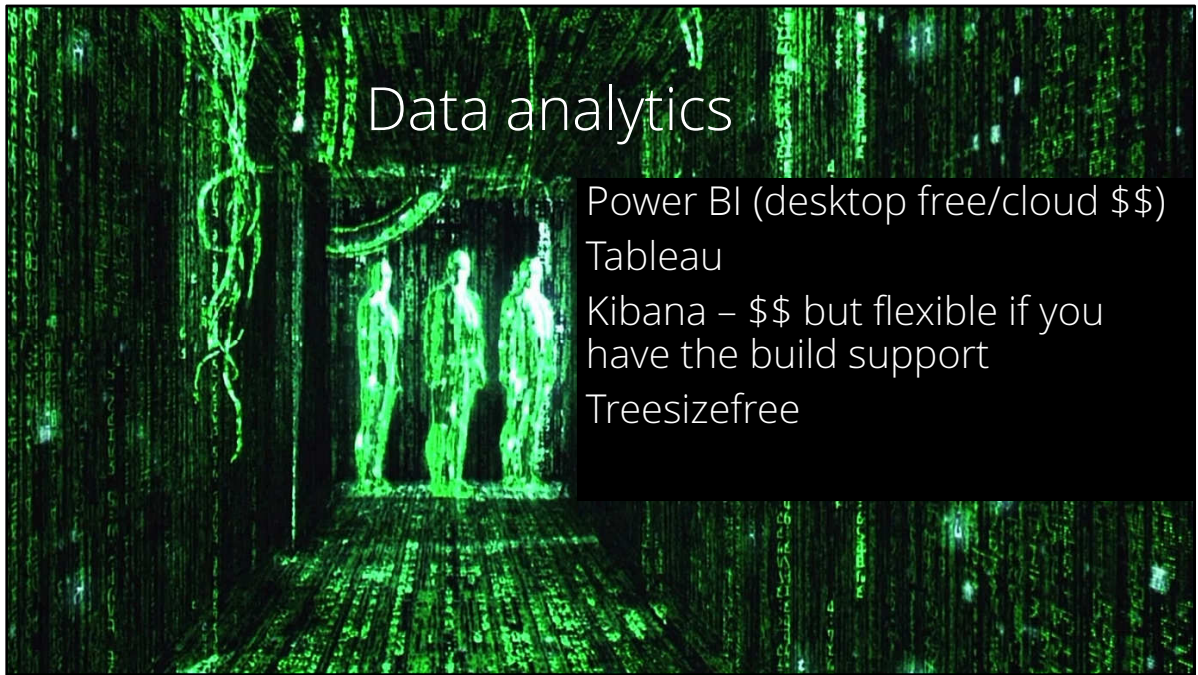
Microsoft Teams
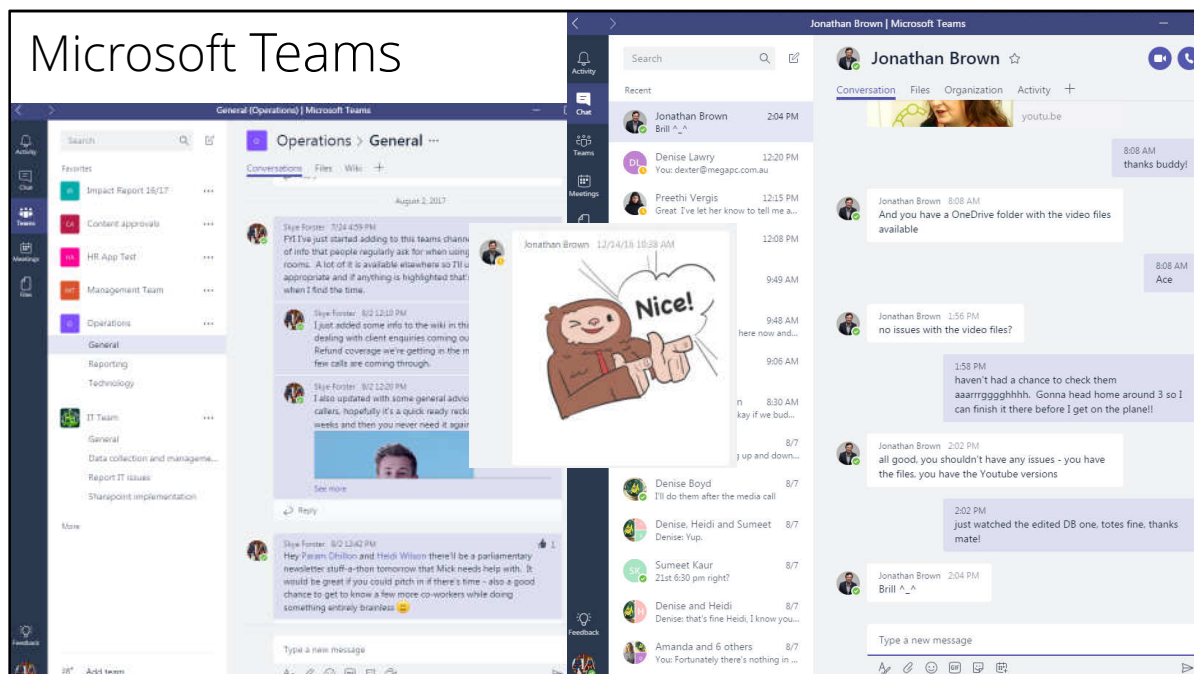
It's possible to add different apps to a Team – for example our Operations team have a channel which we've added a Wiki to so that we can have all the admin related resources in the one place (e.g. supplier contacts, dealing with distressed callers, template responses for enquiries about campaigns we're currently running or emerging/systemic issues etc)

Plus – the best part – you can use GIFs and make Memes in chat! In all seriousness, having something that added a bit of fun to trying a new tool was instrumental in uptake of Teams at our organisation.

Here is our Director Policy & Campaigns to tell you how she uses Teams: https://www.youtube.com/watch?v=3LWIOVlZU40&feature=youtu.be

Another overview with info about relevant alternatives is here: https://www.computerworld.com/article/3276276/collaboration/microsoft-teams-its-features-how-it-compares-to-slack-and-other-rivals.html?

Data analytics

Power BI (desktop free/cloud $$)
Tableau
Kibana – $$ but flexible if you have the build support
Treesizefree

When Google analytics isn't really cutting it and you don't want to spend hours building pretty stuff in Excel there are a growing tribe of data analytics tools that can help. Free tools can get you most of the way but sometimes it's worth making an investment into building a tool that is really going to deliver something worthwhile. Just type 'free data analysis software' into a search engine and you'll get a bunch of hits, my top picks are:
Power BI is Microsoft's version of this and whilst the cloud version is for a fee, you can download the desktop version for free. Again, check out demo videos to get a sense of what it can do.
Tableau - has a free and freemium option
Kibana - is opensource (so free) but you'll need a developer to help you integrate it with your systems. It is very flexible if you can get the build and maintenance support.
Treesizefree is helpful if trying to figure out where the bloat is on your network.

Free phishing/malware prevention and testing tools

- Password apps
- Malwarebytes
- KnowBe4 – numerous tests and tools
- SonicWall – free phishing IQ test
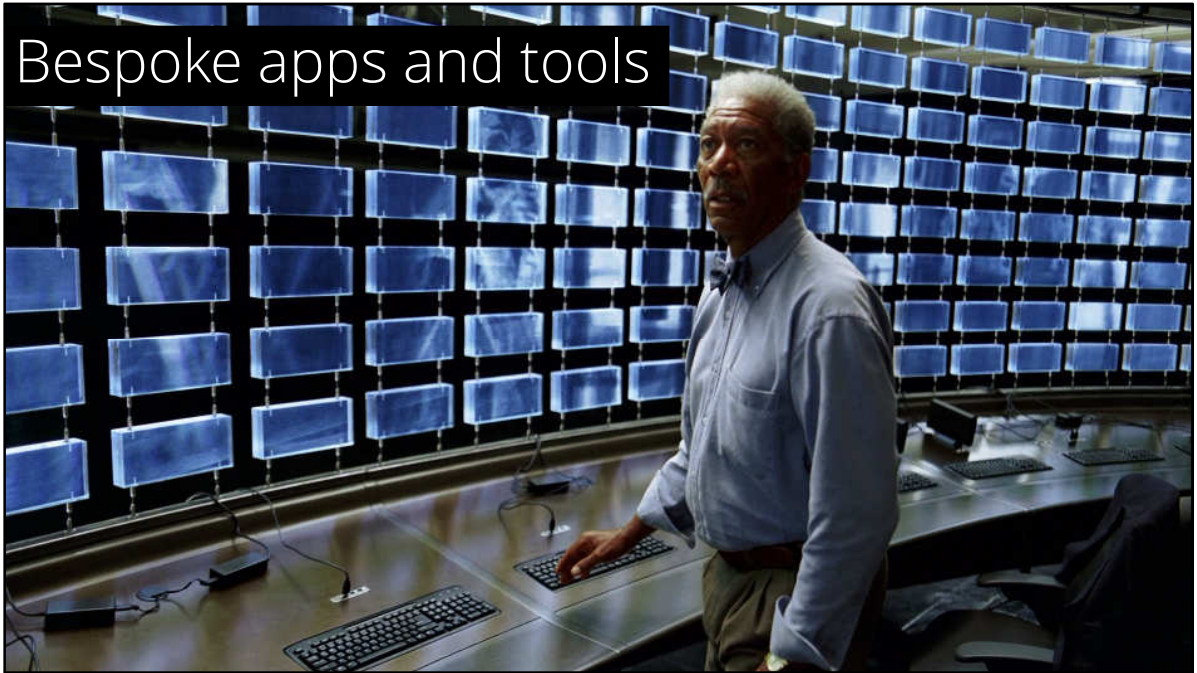- InfosecInstitute – various plans, some free, some paid

https://www.knowbe4.com/
https://www.sonicwall.com/en-us/phishing-iq-test
https://securityiq.infosecinstitute.com
https://howsecureismypassword.net/
Various password apps are great: Teampass, Lastpass, PasswordSafe, KeePass, Roboform – each suit different needs so look at all of them

Bespoke apps and tools

We often spend a large majority of our time dealing with a small group of issues in the same way over and over – these types of problems are ripe for solving with a blanket solution but finding the time and money to resource it can be tricky.

Upwork is an online pool of developers that we've found useful for discrete tasks. You post your task and devs pitch for it OR you can browse skills and approach someone directly.

Almost every state has university programs that are ready and willing to help you build what you need. Sometimes pro bono partners can help and sometimes you can find project funding via grant programs. Examples:

- Actuarial assistance building a payday loan calculator (connection via pro bono partner) which ultimately didn't work due to complex ongoing maintenance needs but was worth exploring
- Moonee Valley Legal Service's Finefixer app
- Consumer Action's DemandARefund website
- In Victoria: RMIT centre for innovative justice – Fastrack program
- Melbourne Uni Law School's LawApps program building on the Neota Logic platform – annual 'bake-off'
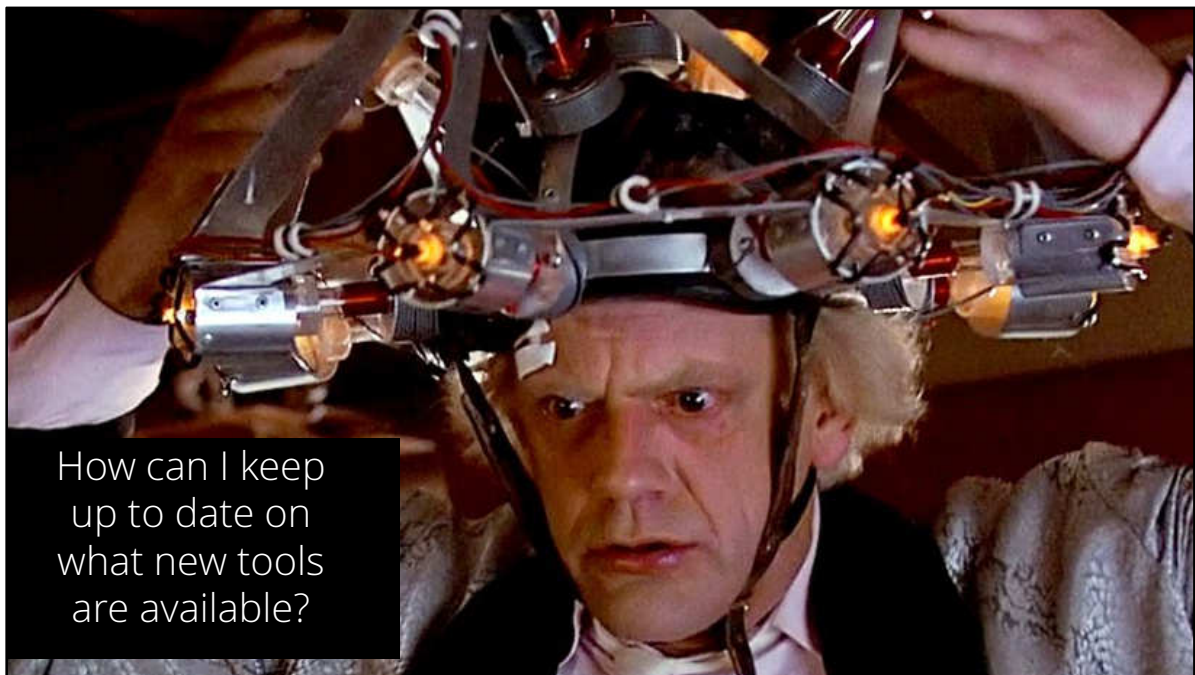
How can I keep up to date on what new tools are available?

Media
Microsoft/Apple updates
Office 365/G Suite/Open Office updates
Non profit IT nerd groups
The interwebz – it's all about asking the right question
Better Cloud newsletter, SpiceWorks forum, 4sysops, Randy F
Smiths ultimatewidowssecurity.com, and itnews.com.au for general news

Questions?

About any of the particular tools mentioned, how to resource them or practical applications

Creating an adventurous culture

- Try before you buy
- Fail fast and often
- Quick wins
- Involve people
- Find champions
- Change management
- Training
- More training
- Review and revise
- Celebrate Success!

- Try before you buy – see if colleague or stakeholder organisations have what you're considering so you can see it in action
- Fail fast and often by trying something new as part of a discrete pilot (e.g. Skype chat v Teams)
- Get some quick wins by targeting small things that are giant bugbears for a majority of people (e.g. too many emails)
- Involve people by understanding every angle of the business practices you're trying to change. Ask them how it's impacting them and if they have any suggestions or ideas. Find your lowest common denominator and your team champion – test ideas with both of them. We spent about 12 months consulting our team before rolling out Office365. The first 6 months was focused on designing what we needed, the latter was building, piloting and making iterative changes with a small group before rollout.
- Change management is HARD. The adage that everyone wants change but noone wants TO change is a truism. Commit to the long haul and break the change into bite size pieces where possible (it isn't always possible). Try to test things thoroughly before rolling them out or you risk people reverting to workarounds if the new way seems a lot harder (even when it isn't).
- Training, training and more training. Particularly when implementing something radical you'll need to basically repeat the same training 2-3 times before it sinks in. Lifelong learning is critical in today's world – some great food for thought in this slideshow: https://www.recode.net/2018/5/30/17385116/mary-meeker-slides-internet-trends-code-conference-2018?
- Set some mid and post project or rollout review dates, plan on revising some things because not only will there be unintended consequences of any change but the change itself may spark an evolution of thinking or practice.
- Celebrate your wins and don't be ashamed to nerd out – just like pop culture memes, optimism and excitement are viral!

I am more than happy to chat to anyone interested in finding out more about the how and why so please get in touch. I can also share documentation on training and scoping if that would be helpful. Drop me a line: skye@consumeraction.org.au