TECH TOOLS: Technology can help organizations be more effective
Erik Erhardt, Ron Nieman, & Glenn Manuel
Leverage tech tools to spend more time dancing and less time creating and reviewing budgets, scheduling meetings, managing organizational data and documents, managing mailing lists, and registering for events.

OUTLINE: Tech Tools (Erik Erhardt, Ron Nieman, & Glenn Manuel)

Technology can help organizations be more effective.

Leverage tech tools to spend more time dancing and less time scheduling meetings, managing organizational data and documents, managing mailing lists, registering for events, creating and reviewing budgets, and much more.

- Ron Nieman
    - Techsoup.org
    - Quickbooks for Non-profits
    - Microsoft Office 365 Enterprise E1 for Nonprofits
    - Microsoft Office and Windows upgrades

- Erik Erhardt
    - Meeting scheduling
        - Example: Meeting times
        - Example: Choosing non-date/time options
    - Collaboration and document storage
        - Example: File sharing
        - Examples: Shared docs
    - Mailing list management
        - Example: FolkMADS weekly email blast

- Glenn Manuel
    - Online Registration System

Ron Nieman

Techsoup.org
- Distributor of donated or highly discounted software and technology to non-profits
- 501(3)c non-profits qualify
- Examples of useful items for small orgs
    Quickbooks for Non-profits: $25-45
    Microsoft Office 365 Enterprise E1 for Nonprofits: Free
    Microsoft Office and Windows upgrades: $12-$24/copy

Budget planning tools
We have created three Excel budget planners that will help you budget for
- Monthly dances or 'mini-weekend' event with a touring band,
- A large multi-band, multi-caller weekend urban or camp event, and
- A shared event between two or three locations, with a touring band.

Notes

TechSoup.org
Techsoup.org is a distributor of donated or highly discounted software, refurbished hardware, credit card processing, technology services, and learning tools.

You need to register to purchase through Techsoup.org. Requirements are 1) a valid 501(3)c non-profit IRS tax ID, 2) a copy of the IRS non-profit qualification letter, and, 3) a primary organization contact responsible for ordering, receiving and distributing software according to license agreements.

TechSoup is geared to large donor organizations with employees, but here are a few examples of what is available that you may find useful to small organizations like ours:

Quickbooks for Non-profits: $25-45, complete Quickbooks plus non-profit tools

Microsoft Office 365 Enterprise E1 for Nonprofits: Free,
- includes Outlook, Excel, Powerpoint, web apps,
- HD teleconferencing,
- public and private (for org use only) web hosting using your domain,
- 100 email accounts with your domain,
- OneDrive terabyte cloud file storage with extensive permission and encryption controls.
- Requires someone with some tech savvy-ness to set up and administer, but it is a very secure (HIPPA compliant) and complete way to manage all the email and documents in your organization.
- Financials, insurance, personnel, board documents can be stored and separated as appropriate.

Safe organization tool if you use it for your treasurer, insurance, corporation and bylaws storage. The tools are there to set up cloud storage for boards, treasurers, subcommittees and volunteers, all in one master organization space. It is a bargain just for the email and web hosting.

Microsoft Office and Windows upgrades: $12-$24/copy, complete with Access, Word, Excel, Outlook, Powerpoint, Publisher, OneDrive and OneNote.

TechSoup has many web-based member and donor database providers, grant tools, and several mobile payment providers for mobile phones and tablets.

Budget planning tools

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These Excel spreadsheets will be available for download from the SWROC website after the conference. Each spreadsheet has detailed instructions and comments at the right side of the spreadsheet.

If you hook your laptop to a large TV, the spreadsheets can allow your board to see what happens when you change prices, get more dancers, try to pay more for halls and talent, etc.

The monthly dance spreadsheet has an example of $500 for the hall, something we now face. You can type in actual numbers for one of our mini-weekends with nationally touring bands and callers too.

These budget tools will give you insight into where you are and where you can be with some simple changes. Find your true break-even audience levels, set admissions prices that work, plan large events, and collaborate with other groups on joint events.

SOME OF OUR TAKE HOME BUDGET LESSONS
- Increase your audience! A cheap hall today may not be tomorrow! $500 halls are a shock, but they can be managed.
- $10 is much better than $8 or $9 or member discounts. Easy for door folks, and attendance increases (it raised perceived value in the community?).
- $5 for youth is good, especially if you need more of them and have a large hall that can hold them. The incremental cost of a youth discount is small.
- Asking $15-25/evening for a tour with national talent is possible in some SW cities. It is still far cheaper than most concerts.
- Be donor-centric. Ask members for $5, $25, $50, $100, $500, or $1000 to help sponsor a big event or tour or even monthly dances. You will be surprised at what folks will do to help you achieve bigger goals.
- Have some bigger goals to achieve.
- You _can_ do joint 2 or 3 evening tours _if_
    - Groups share the expenses (and nights!) in relation to their strengths and audience
    - Groups can be flexible in the day of the week, ceding the best date to the strongest anchor groups
    - You can add a concert to the tour, even just a house concert.
    - You all work to stay focused on the big goal. Today's strong anchor may be the group that needs the most support tomorrow

Basic budget planner for a one-band one-evening or mini-weekend event

(Fri eve, sat. aft, sat eve., one or multiple locations)	Event		
Revenues	Price	#	Door $
Admissions - full price	10.00	85	$ 850.00
- junior price - includes paid scholarships	$ 5.00	25	$ 125.00
- discount, e.g., earlybird	$ -	0	$ -
- junior discount - includes paid scholarships or worktrades	$ -	0	$ -
Additional Support from Donations, Org, Others			$ 100.00
Per Dance Attendance and Revenue		110	$1,075.00

Enter audience scenarios here, e.g., types, charges, estimates of number attending

Enter other donation, fund-raising, org support here.

Expenses			
Callers			$ 100.00
Bands			$ 250.00
Hall Rental, Custodian and other hall staff			$ 500.00
Snacks and/or Meals			$ 35.00
Insurance and other organization expenses			$ 50.00
Publicity			$ 25.00
Travel			$ -
Sound			$ 50.00
All Other (decorations, supplies, etc)			$ 25.00
Total Expenses			$ 1,035.00

Enter expenses here. Note $500 for hall in this scenario

Dancers Needed to Break-Even	
- subsidized with additional donor support	**106**
- Admissions Only (true break even)	**117**

Attendance you need to break-even. This changes as you change the ratio of different admission fee types.

Dance Profit/Loss	Per Dance
- Profit from Admissions Only (without donor support)	**($60.00)**
- Profit after donor additional support	**$40.00**

Your bottom line!

Additional Statistics	
Admissions - full price	77%
- junior price - includes paid scholarships	23%
- discount, e.g., earlybird	0%
- junior discount - includes paid scholarships or worktrades	0%

Budget for Weekend or Festival Events			
	Event		
Revenues	Price	#	Door $
Admissions - full price	$ 150.00	90	$ 13,500.00
- earlybird	$ 140.00	80	$ 11,200.00
- junior discount	$ 75.00	15	$ 1,125.00
- work trades	$ 70.00	15	$ 1,050.00
- passes, full scholarships	$ -	5	$ -
DONATED CASH			$ 1,000.00
Per Dance Attendance and Revenue		205	$27,875.00
Expenses			
Caller 1			$ 800.00
Caller 2			$ 800.00
Caller 3			$ -
	number	amount/person	
Band 1	4	800	$ 3,200.00
Band 2	5	800	$ 4,000.00
Band 3	0	0	$ -
Band 4	0	0	$ -
Sound			$ 1,000.00
Sound			$ 150.00
workshop staff a			$ 100.00
workshop staff b			$ 200.00
workshop staff c			$ 200.00
workshop staff d			$ -
other staff			$ -
other staff			$ -
Hall or Facility Rental, including hall or facility staff			$ 2,500.00
other			$ -
other			$ -
other			$ -
dance insurance/org costs			$ 250.00
Publicity - flyers and mailing			$ 250.00
website and domain			$ 125.00
printing			$ 90.00
fans			$ 150.00
storage rental			$ -
	number	amount/person	
Travel callers and bands	11	550	$ 6,050.00
Travel sound	1	500	$ 500.00
Travel workshop staff			$ -
Travel workshop staff			$ -
Travel other			$ -
catered meals for attendees			$ -
catered meals for talent and staff	13	200	$ 2,600.00
car rental	2	250	$ 500.00
hotels	12	140	$ 1,680.00
Snacks			$ 2,000.00
talent snacks			$ 200.00
snack and meal supplies			$ 500.00
Other (decorations, etc)			$ 500.00
Other (first aid, supplies, etc)			$ 250.00
Total Expenses			$ 26,995.00
Dancers Needed to Break-Even			
- subsidized with additional support		**199**	
- Admissions Only (true break even)		**206**	
Dance Profit/Loss			
			Per Dance
- Profit from Admissions Only (without support)			(120.00)
- Profit after additional support			880.00
Additional Statistics			
Admissions - full price		44%	
- earlybird		39%	
- junior discount		7%	
- work trades		7%	
- passes, full scholarships		2%	

Same entry instruction as for the evening dance worksheet. There are many more categories to cover all the various expenses you might encounter.
This scenario is for a two-band urban camp where attendees find own housing and food.

Use this area for other expences, e.g., a residential camp

Enter estimated total per person cost of any meals for the weekend here, along with the number of folks you need yo feed.

Budget for Shared Joint 2 Dances with outside talent (if 3 shared dances, fill in columns L-N)

Event	Dance 1			Dance 2			Required Budget			Dance 3		
Location	sat dance			fri dance			COMBINED			other dance or concert		
Band, Caller(s) and Travel Cost-share	50%			35%			100%			15%		
Revenues	Price	#	Door $	Price	#	Door $			Door $	Price	#	Door $
Admissions - full price	$ 20.00	110	$ 2,200.00	$ 20.00	66	$ 1,320.00			$ 4,045.00	$ 15.00	35	$ 525.00
- youth	$ 5.00	25	$ 125.00	$ 5.00	6	$ 30.00			$ 205.00	$ 5.00	10	$ 50.00
- other	$ -	0	$ -	$ -	0	$ -			$ -	$ -	0	$ -
- passes or discounts	$ -	0	$ -	$ -	0	$ -			$ -	$ -	0	$ -
Additional Support from PHXTMD and/or Donations			$ 100.00			$ 100.00			$ 300.00			$ 100.00
Per Dance Attendance and Revenue		135	$2,425.00		72	$ 1,450.00			$ 4,550.00		45	$ 675.00

Expenses	Dance 1			Dance 2			Target Budget			Dance 3		
Touring Caller (enter fees in cell K14)	Touring Caller	$ -		Touring Caller	$ -		Touring Caller	$ -		Touring Caller	$ -	
Local Caller (enter fees in cels E14 and H14)	Local Caller	$ 125.00		Local Caller	$ 75.00		Local Caller	$ 200.00		Local Caller	$ -	
							#	amount/person				
Touring Band (enter in cells I18 and J18)		$ 975.00			$ 682.50		3	$650.00	$ 1,950.00		$ 292.50	
Local Band(s) (enter local fees in E19 and H19)							#	amount/person				
Travel (touring talent only, if local, include in local talent fees)		$ 675.00			$ 472.50		3	$450.00	$ 1,350.00		$ 202.50	
Hall Rental		$ 300.00			$ 100.00			$ 400.00			$ -	
Custodian/Snacks		$ 35.00			$ 35.00			$ 95.00			$ 25.00	
Regular per dance insurance/org costs of $44/dance		$ 44.00			$ 20.00			$ 64.00			$ -	
Publicity		$ 125.00			$ 50.00			$ 175.00			$ -	
Sound (repair, upkeep and eqipment rental and/or sound person)		$ 50.00			$ 50.00			$ 150.00			$ 50.00	
All Other (decorations, supplies, etc)		$ 50.00			$ -			$ 50.00			$ -	
Total Expenses		$ 2,379.00			$ 1,485.00			$ 4,434.00			$ 570.00	

Dancers Needed to Break-Even	Dance 1	Dance 2	TOUR	Dance 3
- subsidized with additional PHXTMD/Donor support	133	74	244	37
- Admissions Only (true break even)	139	80	264	45

Dance Profit/Loss	Dance 1	Dance 2	TOUR	Dance 3
	Per Dance	Per Dance	TOUR	Per Dance or Concert
- Profit from Admissions Only (without PHXTMD support)	(54.00)	(135.00)	(184.00)	5.00
- Profit after PHXTMD additional support	46.00	(35.00)	116.00	105.00

Additional Statistics				
Admissions - full price	81%	92%		78%
- youth	19%	8%		22%
- other	0%	0%		0%
- passes or discounts	0%	0%		0%

This prescription is best taken with lots of food and drink.

Erik Erhardt

Meeting scheduling

Problem: Too many emails, texts, or phone calls to determine at a single common date, time, and location for a meeting.

Some solutions: Doodle, Dudle, ScheduleOnce, TimeBridge, and WhenIsGood.

Erik has used doodle.com for about 6 years. It's simple and makes scheduling easy.
Doodle is a Internet calendar tool for time management, and coordinating meetings.
Users are polled to determine the best time and date to meet. Meeting coordinators (administrators) receive email alerts for votes and comments. Registration is required to have this function.

- See doodle.com, bottom menu "Get Started…" for example.

Example: Meeting times
http://doodle.com/9whutaek8qf8m7ar

Example: Choosing non-date/time options
http://doodle.com/953qeqz3u9fk7mha#table

Collaboration and document storage
Google Drive

Google Drive is a file storage and synchronization service which enables user cloud storage, file sharing and collaborative editing.
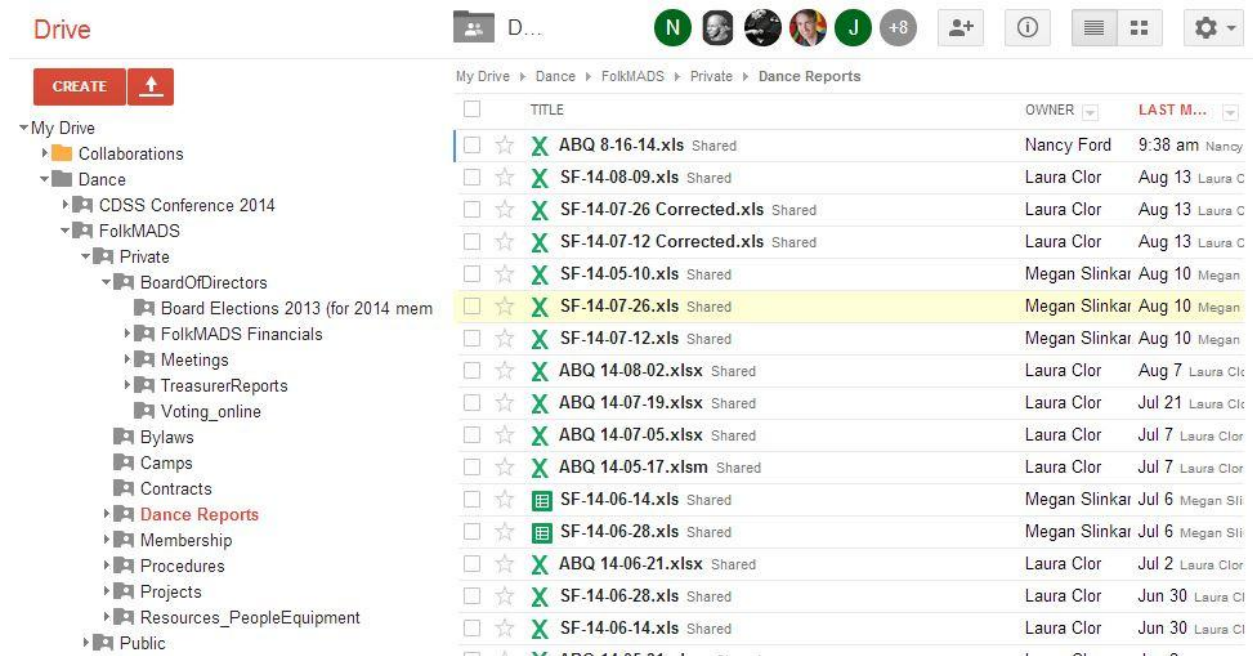
Files shared publicly on Google Drive can be searched with web search engines.

Example: File sharing
Create a folder, share it with others (gives them private access to view/edit).
Create subfolders.
Copy or create files.

Google Drive is the home of **Google Docs**, an office suite of productivity applications, that offer collaborative editing on documents, spreadsheets, presentations, drawings, forms, and more. Within a document, spreadsheet, etc., multiple people can edit at the same time.

Examples: Shared docs
Docs for agenda and meeting minutes
　　　Everyone can view and edit and can see who has added what and when.
　　　Everyone can update during meeting.

DropBox
　　　Another option for file sharing between hard drives.

Mailing list management
mailchimp.com

Entrepreneur (starter package)
If you have fewer than 2,000 subscribers, you can send up to 12,000 emails per month absolutely free.
No expiring trial, contract, or credit card required.

People sign up for mailing list, or remove themselves. You post to the mailing list to get the word out.
Viewable in email or in browser.

 appears at the bottom of FolkMADS.org.

Example: FolkMADS weekly email blast
http://us2.campaign-archive2.com/?u=555d9de1635b98d87a3c5e754&id=dab5fde5ff&e=ea70a34108

Online Registration System

1. Overview

The online registration system provides a way for users to register and pay for an event via a web page. It uses PayPal to collect the money. In the PayPal web site, the user can use either a PayPal account or a credit card (no PayPal account is needed).
Features:
- Registration for up to 4 people (same physical address, phone, and email for all)
- Can specify to not share information with others
- Options to indicate Child or Student
- Hospitality options: Need, Offer, Smoking, Cats, Dogs, Car Pooler
- As many Attendance/Price options as needed
- Optional sales of merchandise (T-Shirts, etc.)
- Optional discount for Early Registration (date is handled automatically)
- Optional discount for other purposes (CDSS membership, etc.)
- Optional payment of PayPal fee
- Confirmation email is sent to user and to registrar
- If hospitality is filled in, email is sent to hospitality coordinator
- Separate page to display registrations (password protected), with download in Excel CSV format
- Error checking for invalid or missing data

2. How It Works

- The user fills in the form, then clicks the Pay button
- The data is checked for invalid or missing data. Errors are displayed in a popup window, and problem fields are outlined in red.
- The user corrects all error and re-submits the form.
- The data is sent to a PHP file in the web site. It is re-verified to try to prevent hacking. Error messages are displayed in a new web page.
- If verification passes, the data is saved in a database as a Pending registration, and the user is sent to the PayPal web site.
- The user pays with either a PayPal account or a credit card.
- PayPal sends the payment information back to a PHP file in your web site.
- The database is updated to indicate the registration is Paid.
- Emails are sent to the user and the registrar.
- If hospitality fields were used, email is sent to the hospitality coordinator.

If the user does not complete the payment (cancels out of PayPal), the registration remains in the Pending state.

If the user attempts to register again, a NEW (Pending) registration is created. The user can re-register an unlimited number of times until payment is completed. When a registration finally

reaches the Paid state, no more registrations for that user are permitted (based on email address).

The registrar can login to special page to see the registrations, and optionally download them in Excel CSV format.

If a user cannot attend the event and needs a refund, the PayPal web site can be used to issue a refund, within 60 days of payment. After 60 days, you will have to issue a refund via check instead of PayPal.

After the event, the PayPal web site can be used to transfer money from PayPal to the linked bank account.

3. Requirements

- PayPal Seller account, linked to a bank account
- Web server with PHP scripting and MySQL databases

4. Setting up a New Registration Page

The registration system for each event consists of several files. You must create a separate directory in the web site for each event, and put all the files for each event in its own directory.

1.1. PayPal Seller Account

The system requires a PayPal Seller Account, linked to a bank account. We were not comfortable allowing internet access to our regular bank account, so we created a new bank account just for PayPal. The PayPal web site can be used to transfer money back and forth between the PayPal account and the new bank account without touching our normal bank account. Similarly, money can be transferred back and forth between the two bank accounts, independently from PayPal. One PayPal account can be used for all of your events.

PayPal does have a fee for transactions, normally paid by the seller:
2.9% of the amount + $0.30. There is a discount for non-profit organizations:
2.2% instead of 2.9%.

Example:
If the total is $100, the fee is $2.90 + $0.30 = $3.20 (or $2.20 + $0.30 = $2.50 for non-profits). The buyer pays the full $100, but the seller only gets $96.80 (or $97.50 for a non-profit).

The registration page calculates the PayPal fee and displays it on the page, with an option for the user to add it to their total (e.g $103.20 or $102.50 instead of $100), so your organization gets the full registration amount.

If you are a non-profit organization, you have to contact PayPal to request non-profit status. You will need to supply some paperwork to prove your non-profit status. Our dance organization is non-profit via its association with CDSS. Upon request, CDSS will send you a letter verifying that you are an affiliate of theirs, and therefore you inherit their non-profit status.

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2.1.   Registration HTML Page

The registration page is a simple HTML form with fields to collect all the data that you need for registration: Name, Address, Phone, Email, Attendance and Payment options, etc.
The system supports many options (listed above in the overview). You will need to customize this page to suit your needs.
A naming convention for the data fields is used so the processing software knows how to access the data. You will need to maintain the naming convention (defined in a more detailed document).

3.1.   MySQL Database

The registration data is saved in a MySQL database in the web server. You will have to create the database and the user/password for the database. All the data for one event is saved in one table. You will have to customize one text file which defines the table (for your specific data fields), then use that file to create the table in the MySQL database. You must use a separate table for each event. A database can contain many tables, so you only need one database for all your events.

4.1.   PHP Configuration File

There are several PHP files which do the processing of the data. You should only need to modify one of them, the configuration file. It contains information like the MySQL database name, user, and password, email addresses for the registrar and hospitality coordinator, and information about the data fields you are using. This must be customized for each event.

5. Testing a Registration Page

A new registration page should be tested thoroughly before putting it into production (test all options, and some typical combinations of options).

If you only customized the registration HTML page, the PHP configuration file, and the database table file, most of the problems with those should generate verification or system errors before the system transfers to PayPal.

Email messages are normally only sent after payment is completed, so testing them requires using PayPal. However, there is an option in the PHP configuration file to send a Pending Registration email to a developer BEFORE going to PayPal. This can be used to check most of the email message without using PayPal.

PayPal does allow purchases (i.e., registrations) to be refunded (within 60 days), so you could do testing using the production web site, and issue refunds for the test registrations.

PayPal also has a special (free) web site for web developers. It has a "sandbox" version of the PayPal system. This can be used for testing, without actually transferring any money. You can create dummy buyer and seller accounts, and use them to test the registration system before putting it online.

The PHP configuration file has settings for both the production and development PayPal web sites, and an easy way to switch between them.
While not absolutely necessary, it is recommended to get and use a PayPal Developer account to test your registration page before putting it into production.

6. Demo

A demo of the registration system can be found at:
http://www.nttds.org/online-reg-demo/online_reg.html

That page will contain a link to download a zip file of the system, including a more detailed user guide.

For more information, contact:
Glenn Manuel   gemdancer@fastem.com   972-231-5639   (Dallas, TX)

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