



# Regional Patient Advocacy Community Toolkit: Technology

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Published in association with The Beryl Institute, this toolkit is authored directly by members of the Patient Advocacy Community. To contribute to a future publication, contact a member of the PAC leadership team.

## Technology Tips and Tricks

PAC Group Members have various degrees of technical skills and resources. Please note that this section of the toolkit is not all encompassing nor will it provide a step-by-step guide to create a website. Instead, it is designed in an easy to read format to give professionals a jumpstart with resources needed to sustain the use of technology for communication and marketing. The information presented in this section is to be used as a guide and not all parts may be applicable to your group.

## Preface – Three Common Myths

Here are three common myths when it comes to using technology within your regional group:

- 1. It's too expensive.** At the end of this section, there is a list of several resources for your organization to use. The good news is that just about everything listed can be done for free or very little cost.
- 2. It's too complicated.** The truth is that technology has changed considerably in the last few years to enable end users to do some very powerful things through a web browser. In fact, the majority of these things can now be done on a smart phone.
- 3. It requires someone with technical skills.** However, it's critical that you have someone with excellent communication and marketing skills to effectively use the technology for its intended purpose.

Google Apps is a product which can be used anywhere there is internet access. It consists of a suite of apps for productivity (like Microsoft Office), web development (website), e-mailing, calendaring, managing contacts, sharing files online, creating group discussions and hundreds of third-party add-on's to do just about anything else you can think of. It is used by nearly a million organizations around the world, including Google itself (a \$28 Billion company), Stanford University and even the City of San Francisco.

What makes Google Apps such an amazing resource is that it is robust and scalable. In addition, for small non-profits with an educational purpose it is FREE. Additionally, it is only as complex as you want it to be, and can be setup by anyone with some basic computer skills. Expensive? Complex? Technical Skills? They're just myths.

## How to Begin

Now that you know your organization CAN utilize technology, the next question is "Where do we begin?" It's a great question, but it's one that you and your team must answer and it's done through strategic planning. If you skip this step, the three myths could very well become a reality. To avoid this and to get started with your plan, it's extremely important that you answer the following questions:

- 1. What are we trying to accomplish?** In most cases, local groups are going to use technology to enhance communication with its members (promote events, send e-newsletter, and attempt to facilitate electronic interaction among the members).
- 2. With whom are we trying to effectively communicate?**
- 3. What are we currently using?**
- 4. Is it providing the value we want it to?** If not, does it need to be improved or does it need to be done away with?
- 5. Do we need technology for operational purposes?** i.e. common file storage, membership database, financials, event online registrations, online credit card transactions? The keyword here is need. Are your members asking for it? Would you gain additional members? Would it make the organization much more productive & efficient? Or would it just be nice to have? If you answered "nice to have," it's probably going to result in more frustration than it's worth.
- 6. What do our members want?** DON'T ASSUME... ASK THEM!
- 7. What are other groups doing...or not doing?** It's much easier to be resourceful than creative when it comes to technology. It's also wiser to learn from someone else's mistakes than to have to learn from your own.

- 8. What else should we consider?** As mentioned earlier, it is essential to have someone who can organize a communication and marketing plan. A website or newsletter can look great but be useless without dynamic content. Also, consider how technology is changing and how you interact with technology. Two years ago, very few gave thought to having a mobile website. Is this important for your members? Brainstorm as much as you can before you begin organizing your strategy.

Once you have this information, you have only one goal: **to simplify it down to two or three priorities based on the value it provides for your members.**

## Priorities

For most state groups, there will be three priorities which tend to emerge. Each one is based on how end users tend to interact with technology, especially when there is information to be gained.

1. The first priority is to establish a presence for those who want to know about your organization, the value of membership, how to join and what activities and events are coming up that members or prospective members would be interested in. To accomplish this, a basic website, which can be managed by your own team, is easy and practical.
2. The second priority is to get useful information to those who have expressed an interest in your group. The solution for this is to utilize a means of mass communication such as an e-newsletter or mass e-mail. Please note that as a small non-profit organization, it is against the law to send unsolicited emails. Your list must include those who have opted in. For members, it simply needs to be stated on the membership application that this will be the primary means for communicating with members.
3. Lastly, the value in joining a local PAC Group is that it creates a collective pool of knowledge and resources for members to utilize. Today, this is especially easy through the use of social media. By "connecting" with other individuals and organizations who share similar interests, a flood of information can be generated and delivered to your members as often as they wish to receive it. Facebook is the most common and robust social media tool currently available, but Twitter and LinkedIn can also be very useful.

In summary, each group should consider a basic website, a means to communicate by mass e-mail and a social media site for the exchange of knowledge and resources.

## Getting Started

The means to accomplish these three priorities are endless. The recommendations listed below are solid solutions, easy to use and minimal in cost. While some of the information below may sound technical, much of it will become clearer as you begin reading about each solution. With each solution, the bare minimum is provided. Anything listed as optional is for enhancement and is not required.

### Website Platform

WordPress ([www.wordpress.org](http://www.wordpress.org))

#### Required:

- You'll need to purchase a domain name (www.yourgrouppname.org or whatever you want it to be) and secure a hosting company. A great one-stop-shop is Dreamhost, [www.dreamhost.com](http://www.dreamhost.com). Dreamhost provides hosting for as little as \$7 a month which includes the cost of the domain name. Dreamhost also offers what they call a 1-click install of WordPress websites. It's that easy to setup. Their customer support is through an online messaging system, but they are excellent at answering your questions.

#### Optional:

- For a design template, you can go to [www.templatemonster.com](http://www.templatemonster.com) and select all WordPress Templates.
- Another resource is [www.elance.com](http://www.elance.com). Elance is like E-bay except it provides technical services instead of products. Need a logo professional designed? Want someone to completely setup your website? Stuck and need help? Elance is a great resource.

### Mass Communication

#### Required:

- The top 5 listed services were Contact, Benchmark E-mail, Constant Contact, Pinpoint and MailChimp: <http://email-marketing-serivce-review.toptenreviews.com/>

#### Optional:

- Consider other features you may want to utilize in the future. For example, Contact Contact has an add-on Event Marketing feature which makes online registrations really easy. MailChimp's free option has some limitations, but overall it will do what you need it to do.

### Social Media

#### Required:

- This subject is too broad to cover in this section. The primary social media platforms are Facebook, Twitter and LinkedIn. It is recommended you create accounts for your group and then look up other state groups and other organizations and learn from them. Several of the mass e-mail solutions above have integrated marketing strategies for social media and offer free webinars to help you become more effective.

#### Optional:

- HootSuite is a great tool to help manage all of your social media accounts in one location.

These three solutions may help in taking your organization to the next level and provide additional value to your members.

## Other Miscellaneous Resources

Feel free to try the following resources and see if they are helpful for your state group.

### Google Apps Non-Profit/Education Ed.

- Intranet
- E-Mail accounts
- Website
- Calendar sharing
- File sharing & editing through "Cloud Share"
- Docs, Spreadsheets, Power Point tools
- Google Marketplace Apps (Everything you need built into your Google Apps account)
- Financial management tools
- Sharing information
- Google Talk
- Electronic forms
- File backups

**Training** – start with [YouTube](#): seems like there is now a video for everything you need to know.

### **Elance** ([elance.com](#))

- Customized Graphic Artist
- Web developers
- Technology assistance/support
- Marketing Agents

### **E-Newsletters**

- [Constant Contact](#)
- [Mail Chimp](#) (Free with Google Apps)
- [Subscriber Mail](#)

### **Social Networking**

- [Facebook](#)
- [Twitter](#)
- [LinkedIn](#)
- [HootSuite](#)

### **Shared File Storage**

- [Dropbox](#)
- [Google Apps](#)
- [Amazon Cloud Drive](#)

### **Survey Tools & Electronic Voting**

- [Survey Monkey](#)
- [Google Apps](#)

- [ElectionBuddy.com](#)
- Can be added on to [Constant Contact](#)

### **Miscellaneous Resources for Group Websites**

- Hosting
  - [GoDaddy.com](#)
  - [Network Solutions](#)
  - [Dreamhost](#)
- Domain Names
  - Try hosting company first
  - [Network Solutions](#)
  - [Easy DNS](#)
- Template Designs
  - [templatemonster.com](#)
  - [wp.smashingmagazine.com](#)
- Graphic Design
  - [Elance.com](#)
  - IStockPhoto.com
- Blogs
  - [Wordpress](#)
  - [Blogger.com](#)
- Marketing & Branding
  - Color Schemes – [colourlovers.com](#)
  - Style Guides – [smashingmagazine.com](#)
  - Corporate identity packages – [templatemonster.com](#)
  - [Elance.com](#)
  - [templatemonster.com](#)
- Phone/Conference Calling
  - [freeconferencecall.com](#)
  - Google Talk (see Google Apps above) You can secure a free telephone # for your organization and have it point to any phone you want it to.
  - Skype for Small Business – now includes conference calling
- Software for Non-Profits
  - If you keep your own books, QuickBooks Premier includes setup specifically for non-profits.
  - Membership Management w/website (SaaS)
    - [Capterra](#) – use this to find one that fits your needs
    - [MemberClicks.com](#)
    - [YourMembership.com](#)

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