Communication Tools for PTA's

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What you'll learn here

- For every problem or need, there are plenty of solutions and options that should work for you.

- I'll present 2-3 choices for each category, but there are still <u>many</u> other products out there. Check around!

- Sorry, no screenshots, but I can show anything discussed

- Some have a cost, some don't. If you're willing to work small, almost all have a free option or tier.

- Keep the perspective of using a toolbox, rather than using only one tool that does everything.

Where we're going

- Some terminology to help frame your options

- Dive into each category:
    - Office Productivity
    - Collaboration software
    - Email, texting, social business software
    - CRM, sign-ups, events
    - Social media, video conferencing
    - Task and project management
    - Web hosting, content management systems
    - Survey tools, databases, do-it-all packages

Terminology

- Traditional buy-it approach:
    - COTS (Commercial Off-The-Shelf) software
    - Microsoft Windows, Microsoft Office, Adobe, etc.

- FOSS = Free and/or Open Source Software
    - Free, or with a support model, at cost (freemium)

- _aaS = (Something) as-a-Service software
    - Focus on: SaaS = Software as-a-Service
    - Slack, MailChimp, Google Docs, Gmail, Zoho, etc.
    - Basically anything in the "cloud" (on the web)
    - Also has freemium model attributes

COTS Offerings

Advantages

- You own it - buy it once

- Runs on your computer, devoted solely to you.

- Generally much more powerful (e.g., Excel) or sophisticated, and can do more (e.g., Photoshop).

- Highly supported

Disadvantages

- Pay up front

- Upgrades can be costly

- Can't easily be shared

- Have to keep your computer with you always.

- Eventually will version out

FOSS Offerings

Advantages

- Either free, or very low cost

- Generally mimic mainstream COTS offerings.

- Probably can do 90% of what you need for free.

- Easy for a PTA to "own"

- Great to dip your toes in…

Disadvantages

- Not as polished as COTS

- Many have install issues or difficulties that you need to research yourself.

- Support may be missing or at extra cost.

- Packages can disappear if no one maintains them.

SaaS Offerings

Advantages

- "They" manage it for you
- It's available anywhere, as long as you can get to web.
- Automatic version upgrades
- Very easy to use
- Can share with others
- Disposable

Disadvantages

- Some have a price or cost, depending on what you want to do, or size limits.
- Browser choice can matter
- You don't own it
- New features might conflict with old features.
- You're at their mercy

Which is the right path?

- START with a SaaS offering. Google and look for sites that do what you want, and try it out FREE *first*.

- If you can't find the right features, give a FOSS package a try. The price will be much lower, or free, and if it doesn't work out, it's not such big loss.

- If nothing matches your needs, go the COTS route

- **TODAY, SaaS is the de-facto leader and will increase!**

Notes on costs

- Costs/prices depend on a lot of factors (TCO)

- COTS is usually full price, but you can get educational discount or non-profit discount in some cases.

- FOSS offerings are either free, very cheap, or you pay for the level of service/support you need.

- SaaS are usually tier-based, depending on number of users, or number of projects, or sizes, etc. MOST have a free tier with limited users/sizes/features.

- $XX/u/m = user per month; /u/y = user per year, etc. Some pricing may be dependent on annual purchase vs monthly.

CA PTA Specific

PTAEZ

- Do-it-all offering for finance, accounting, membership, tracking, budgeting, fund raising, checks, banking, etc.

- Fits well with CAPTA needs for your PTA. Does about 90% of what your board will need for year.

- Simplifies cross-term changes

- Cost based on revenue ($99-$250 depending on module).

eBylaws

- You need to update bylaws every 5 years. This is how you will want to do it.

- Easy for parliamentarians to make changes and print.

- Potential enhancements coming in next year or so!

- No cost – free to all CA PTAs
  - Signup online: capta.org

Don't forget Totem for online membership!

Office Productivity

Microsoft Office

- Buy it (~$200), subscribe to Office365 ($99), or mobile.

- Word, Excel, PowerPoint, Access, Publisher, OneNote.

- Similar features to GDocs when using Office365 online rather than COTS.

- Compatible with GDocs

- O365 gives you downloadable FULL versions of software.

✪ Google Docs

- Free to ~$6/u/m or just use as part of your Gmail.

- Kids probably have it

- Great for sharing docs and working on same docs.

- Forms is <u>not</u> Access!

- Compatible with Office

Office Productivity

Libre Office

- FOSS option. VERY compatible with Office (more than GDocs).

- Installed, not SaaS

- Has an Access equivalent

- Very strong & supportive user base on web.

Only Office

- Offers online version of Libre Office, plus other tools (CRM, Collab, email).

- Connects with online doc storage services (box, etc.).

- Cost: ~$70/u/y

- Great if you want other tools too (more as we go along).

- Has downloadable versions

Office Productivity

Apple iCloud

- Similar to Google Docs, but has no Access equivalent.

- Very familiar for Mac users (especially if no Office experience in family).

- Not as easy to share or work with others – really meant for personal use.

Mobile Apps

- Everything mentioned so far as a mobile version right now.

- Mobile apps are limited in functionality, and can be funky to use.

- Not intended for sharing, but just for gaining access.

Office Productivity

- There's almost no compelling reason to go COTS these days, but some still prefer it.

- They all offer roughly the same functionality, so pick what you think will work best for your team.

- If you're looking more for a do-it-all solution, Only Office (and Mango Apps) may be a good choice because it will do many of the things we will discuss.

- Many tools have integration points with the ones we just reviewed.

Document sharing & storage

Dropbox

- Pretty much de-facto standard these days, but have gotten greedy.

- Free = 2GB storage, $9/u/m gives you 2TB of storage.

- You can "earn" small additional blocks for referrals.

- Smoothest plugin to work with, and shares well.

✪ Box

- Aims at corporate users, so very strong security/safety.

- Free = 10GB, $5/u/m gets you 100GB. Has workgroup plan.

- Virtually same feature set as Dropbox. Plugin also works well.

- Recommend for long-term use by continuing boards.

Document sharing & storage

Google Drive

- You probably have a free version of this already.

- If you're using GDocs, then this is built in to tools.

- Sharing ease depends on what others are using (dropbox/box don't care what you use elsewhere).

Microsoft OneDrive

- You probably have a free version of this already, but if not, it comes with O365.

- Integrates really well with Office products and O365.

- Nothing super fancy here, but it just works.

Document sharing & storage

- All allow you to store files online, access from anywhere, share with others, archive, download, and so on.

- Some work better within their own ecosystem

- You want to use this to maintain a PTA board repository over terms and across officer roles. Organize by year.
  - Give old password to SEVERAL new board members
  - Have President change the password immediately and share

- Pick the one that will give you the most long term storage space for your board, or has the best price.

Collaboration Tools

- These allow you to work within groups or teams, and usually provide a number of useful features.

- The key here is that the focus isn't on YOU, but on your team or group. How to communicate & share.

- Many of the Office Productivity and/or Document sharing & storage tools do some of this, or already integrate with these, so keep that in mind.

- CAPTA may soon move away from paper records and start using electronic records. For now, do both.

Collaboration Tools

✪ Mango Apps

- Extremely full-featured, with dozens of config options. Very customizable.

- Offers calendar, forms, databases, emails, docs, storage, projects, tasks, video conferencing, alerts, etc…

- Costs ~$3-6/u/m, but can run with 1 user and use <u>guests</u>.

- Works great for PTAs with lots of groups & teams.

✪ Glip

- Free to $5/u/m depending on modules desired.

- Slimmer version of Mango with a few less modules. Can be better for less computer savvy teams.

- Same guest user approach can be used to reduce costs.

- Has some voice-calling integration if you want that.

Collaboration Tools

Bitrix24

- Free, up to 12 users and 5GB

- Similar to Glip, but can also be a small free website too.

- Can scale up to a formal intranet for a PTA if you ultimately want that.

Others…

- Only Office has some collaboration features.

- Wrike and Podio do the same thing, but are more expensive than these.

- Exact modules you use will make a difference in all pricing plans.

Email Campaigns

✪ MailChimp

- Free, up to 2000 contacts

- Some limits on how many emails you can send out.

- Very simple to use, create campaigns, track results, add/segment users.

- Nice integration with WordPress sites.

Constant Contact

- A more professional version. Works a bit better with imported Word/PDF documents for campaigns.

- Costs $20/month for 500 contacts, but has more add-ons like social media blasts.

- Probably better if you need a super professional look, or want to combine tools.

You MUST watch your spam & unsubscribes carefully!

Email Campaigns

Gmail

- The cheap and easy solution is using Gmail or other Email service, and setting up distribution lists.

- The risk is people marking you as spam, and/or your message getting classified as spam by recipients.

- Not as well organized or powerful as a dedicated service.

- How do you transition between terms? Think about it…

Groups

- Google, Yahoo, groups.io

- Easier to transition, since it's yet another "service" and can pass along access.

- More appropriate way to email a large group, but a lot of these group services have messages marked as spam quite often.

Texting

Remind

- Free, but technically aimed at schools and teachers.

- A way to send text messages to large groups.

- Requires opt-in, and can be confusing to some folks.

- Kind of limited feature set

⭐ GroupMe

- Great free option for reaching a group of people within an app (iOS/Android)

- Maintenance of lists is difficult because all within app.

- Joining is much easier

- Best: create new group each calendar year.

Texting

Avochato

- REAL text messaging, but at a cost: $99/month!

- Maybe: non-profit discount

- Full featured, absolutely will work for texting.

- Recommend seeing if school has an account you can use.

EZTexting.com

- Per-message cost ($0.05) or 1000 messages for $49/mon.

- More affordable "true" texting option, especially if only sending infrequent messages/alerts.

- 10 messages/month x 100 members = $50/month

- 1 message x 100 = $5/month

⭐ Texting

- Seriously consider *why* you want to text. Yes, it's super convenient & direct, but it's costly to do right.

- If GroupMe works, it's free and private

- If Twitter works, you can just ask people to follow

- Maybe Instagram or Facebook are better these days?

Social Business

- Called this because it's the "new" way to communicate outside of email/texting.

- You are relying on social connections to group and communicate with folks.

- It's a true paradigm shift in how you communicate…

- Slack is the de-facto leader, but it's not always the easiest way for folks to start buying into SBS.

- All have mobile versions (can use instead of texting)

Social Business

⭐ Slack

- Free, most popular, good chance some of your folks know it or use it.

- Has a 1,000 history limit

- If used a lot, can get pretty overwhelming to keep up.

- Kind of requires an idea of how to use it (@, /bots, attachments, etc.).

Microsoft Teams

- Cleaner and simpler, but not as well known.

- Free as of late 2018 for any sized group or user count.

- Include some collaboration tools like wikis and document sharing.

- Less intimidating to users

Contact Relationship Management (CRM)

⭐ Hubspot

- "Free forever" mantra

- Focus is on tracking people through a lifecycle, but you can use CRM for more.

- Has many other features such as campaigns, docs, forms, emails, etc., that might replace other tools.

- Not a panacea, but for people management, it is hard to beat this choice.

Zoho CRM

- Same feature set as Hubspot, but has some cost as you grow. Free up to 3 users, though.

- Very flexible, if you have tech-savvy folks on board who want to customize it.

- Integrates with entire Zoho product line, and shares information across each.

Sign ups & Events

⭐ Signup Genius

- Free for most usages, but intended for non-profit, so if you get business-like, the costs go up.

- Basic sign up, good for events, volunteering, simple RSVPs, filling slots on sheets, etc.

- Can export lists, send emails to attendees and more.

- Good for "many" events, so-so for single big events.

⭐ EventBrite

- Professional event sign up and management. Free for free ticket events, but if you charge for anything, they'll take a percentage of sales.

- Feature-rich and powerful. Can send automated emails, host event information, show analytics and more.

- Has a history of changing pricing often, so hard to predict costs. Offers non-profit discount, but really hard to obtain.

- Bad for "many" events, but really great for big events.

Sign ups & Events

★ Doodle Polls

- Free. Not specifically a sign up tool, but a very clever way of getting sign up responses.

- Perfect for meeting availability

- Create a poll, list possible dates/ times, and people reply with availability. Best times bubble up to top.

- Can easily be used to sign people up for things not dates, by changing titles

- Quick and simple to use.

Google Forms

- Part of the Google Docs family. It is a cross between a database and a survey tool.

- Allows you to create forms to collect information (such as sign ups or events). Easy to set up a form.

- Doesn't do much beyond that though (no event management features or email contacts).

- Free and included with GDocs.

⭐ Social Media

- Social media is *very* generational by nature. Know your audience to use the right tool.

- Some are push (active content to you) and some are pull (you go get content). Each has a purpose.

- There's no reason you can't use more than one tool.

- It can be exhausting to manage social media, so find someone who is good at it and has a passion for it.

- This should be a separate position/role/chair in your PTA!

- Good news: all social media tools are free!

Social Media

Facebook

- Tends to hit the 23+ crowd rather than school kids.

- **Really need to curate content** to be successful. It's easy to get lost or ignored by Facebook's algorithms.

- Successful only if you work it, otherwise it's usually ignored by most folks.

- Good resource for "all around" content: messaging, photos, videos, updates, etc.

- Not so great for docs and forms.

Instagram

- Perfect for under 23 crowd

- Not intended to be a portal, but rather a "moment" in time message.

- Good for showing what is happening at school or PTA, but not for sharing info.

- Augments Facebook, but doesn't replace it.

Social Media

Twitter

- More push than pull. People are asked to follow a feed, and when traffic is sent, they are alerted.

- Similar to texting, but public and open-ended.

- Use for short announcements, reminders, status updates, etc.

- Augments Facebook, and email campaigns well.

Other considerations

- The "big three" are Facebook, Instagram, and Twitter. If you're serious about social media, use all three together, timed well.

- Together, they cover 95% of ways people want to get reached. 5% goes to email, texting, and social business.

- Augments email and email campaigns, so don't miss it.

Social Media

Snapchat

- There's nothing to see here. Move along.

TikTok (musical.ly)

- You don't need to be there, trust me. Stay far, far away.

Facebook Live

- Works well with a PTA Facebook page.

- Not greatest quality, but okay for short videos.

- Best for sports, outdoor events

Periscope

- Like Facebook Live for Twitter, really. Best for broadcasting "right now" events from school.

- Doesn't save to Facebook.

As with ALL social media, use the Red/Yellow/Green model!

Video Conferencing

⭐ Zoom

- Free for any meeting up to 40 minutes in length. $15/month for unlimited meetings up to 100 people.

- Very well designed, and covers 99% of your video conferencing needs.

- Can be used for committee meetings and board meetings if you create standing rules that say so. *Ask me for details.

Skype

- Free. A lot of folks have it, so may have accounts.

- Great for one on one or training small groups.

- Not so great for large groups.

- Mobile apps work great.

Video Conferencing

Join.me

- Very similar to Zoom

- Can create meetings on fly immediately as needed.

- Recently bumped price to $10/month for unlimited length, but 5 attendees (Zoom is opposite model).

- Would recommend if you have frequent long meetings with small groups.

GoToMeeting/Webex

- More expensive versions of Zoom and Join.me.

- Very similar offerings to each other, and pricing is similar.

- For trainings and large seminars, these are the best. Otherwise, not as cost competitive.

Task Management

⭐ Trello

- Pretty much the standard for task management. For managing most tasks, this will probably be all you need.

- It is your "to do" list on steroids, with ability to group them, add reminders, attach documents, share, coordinate with teams, etc.

- Free for basic features.

- Very nice interface on web and mobile.

Todoist

- Strong mobile following offering many of same features.

- Some people prefer this style of managing "to do" lists. Trello is more Kanban, and Todoist is more 7-habits

- Free for basic features.

- Also consider: Wunderlist and ToodleDo options.

Simple task management is also in many collaboration tools.

Task vs. Project

- Task management is simpler, and really focused on great productivity, easily managed.

- Project management is more complex, has deadlines and milestones, detailed plans, and is better suited for longer projects with many moving parts.

- Think Membership Drive "to do's" versus Fall Festival planning.

- Think individuals versus groups.

- Most project managers have a cost associated with them.

Project Management

✪ Asana

- Extremely well done, easily managing just about any complex project(s).

- Great UI and easy to use.

- Manages multiple projects with deadlines, tasks, documents, teams, etc.

- Free for *public* projects up to 15 team members. $10/u/m for larger teams/projects.

Taiga.io

- Similar to Asana with just fewer config options and a couple fewer features.

- Free for public projects of any size. Includes 1 private project up to 3 users. $7/u/m for larger teams/projects.

- Doesn't have complex project tracking.

Project Management

Wrike

- Very professional. More traditional project tracking.

- Can manage very complex or large projects, with shared teams and docs.

- Free for 5 users. $10/u/m for larger, but includes some additional tools.

- Use if you outgrow Asana.

Only Office / Mango Apps

- Both Only Office and Mango Apps offer a simple project management tool built into their platform.

- If you're considering them for other needs, this could also cover your task and project management needs.

Web Hosting

- **Why do you need your own PTA website?**
  - **Great question! Ask yourself.**
  - **If it is simple in nature, school/district might let you use their sites, and/or their tools.**
  - **If you don't want to tackle social media, then you need a PTA presence somewhere (i.e., a website).**

- **Having a website means you need someone skilled and willing to maintain it. This is a real challenge with PTAs each term.**

- **Your website should be simple, informative, easy to get around, and link to all your other presences. Nothing more.**

- **Website = domain name + host + web site software/pages**

- **Websites must have CMS's or HTML pages to show content**

Web Hosting

GoDaddy

- Pretty basic web hosting, with a domain name + site package from $15-$100/year.

- Reasonably fast response time for website.

- Very easy to add features as you need them (WordPress, email service, etc.).

✪ NameCheap

- Very similar in features and price to GoDaddy.

- Fewer users, so usually a bit faster in response time.

- Good "control panel" features with one-click service add-ons.

Both have good, simple Site Builders you can use.

Web Hosting

Weebly

- Free shared hosting (your site is xyz.weebly.com) if you just need to get started.

- Options to upgrade to full hosting if you want it ($5/month and up).

- Basic site builder features.

Wix

- Similar to Weebly, but has a better site builder.

- Good for basic, getting started type sites.

- Offers better plans at $11/month if desired, but honestly better off with GoDaddy or NameCheap if you want something nice.

Totally free basic option: Google Sites

Content Management Systems (CMS)

⭐ WordPress

- About 60% of **all sites** world wide run on WordPress.

- Once installed and set up, you don't need to know HTML or create pages. Everything is just content you type or paste in.

- Has zillions of plug-ins for just about any need or feature you want to provide.

- It's FOSS, but some plug-ins will charge (events, forms, etc.).

Alternatives

- Weebly/wix are simple CMS's of their own.

- Tumblr and Blogspot are similar CMS offerings, but not nearly as customizable.

- Drupal is the next biggest professional CMS product. Also free, but more complex to set up.

If you're going to create a serious standalone website, use WordPress!

Survey Tools

⭐ SurveyMonkey

- Free for surveys up to 10 questions long. > $37/month for more complex surveys.

- Basic free should work for almost any PTA need. If not, highly suggest Google Forms before paying more for SurveyMonkey.

- Super easy to use, good analytics, well known, etc.

Padlet

- A school/teacher focused survey tool.

- Has good exposure in education system.

- Your school/district may have access to it: ask!

- Pricing is $12/month if you want to use your own.

Survey Tools

Google Forms

- More of a form builder than survey tool, but good for surveys if you don't need any fancy analytics or reporting.

- Totally free, with no limits on any aspect.

- Use Google Forms as a backup for any other form or survey need that you outgrow or over-use.

Wufoo

- Free up to 10 fields, and > $19/month for more fields and/or responses.

- Very similar to others, but lots of good pre-built surveys you can copy, so you spend less time designing and more time getting back answers.

Database Tools

AirTable

- Think of this as a spreadsheet on the web (SaaS), but with some really cool database-like features.

- Use it like a spreadsheet or a database as you want.

- Collaborative, so others can work on it with you.

- Free to >$10-$20/month depending on how many records you need to keep.

✪ Zoho Creator

- A full-featured database SaaS, but built around a very nice wizard to help you build tables, forms and reports quickly.

- Can later be built into sophisticated apps and extended.

- Good mobile database access app for on-the-go changes.

- Free to $15/u/m depending on how many records you keep.

Do-It-All Tools

Konstella

- Built specifically to support PTAs with all basic needs in multiple areas.

- NOT a financial system, but does have some of that.

- Could very well cover 90% of a PTAs basic needs.

- Basic plan is free, or $599/ year if you want all modules.

Only Office / Mango Apps

- These two merge many of the main tools together, such as document sharing and collaboration, task and project management, groups, emailing, surveys, forms, etc.

- Generally will pay ~$100/ year for basic plans, and use guest privileges to allow other users to access.

PTA continuity

- If you choose a tool/service, let your key leaders (President, Secretary & Treasurer) know:
    - What you signed up for (what it will do for you)
    - What data you will put in the tool/service
    - What logins & passwords you've used
    - What costs might be associated with usage
    - Be able to export or pull out all data at any time

- Whatever you pick, it must be transferrable to the next board, so don't use personal accounts or passwords.

- Use generic logins and emails like "SCESpta@gmail" or something similar for logins. You should be able to give up your account at any time.

- If there is a breach, or you accidentally disclose private information, let your board know immediately.

Where to find more?

- AlternativeTo.net

- Capterra.com

- GetApp.com

- TopTenReviews / PCMagazine (online)

- Apple AppStore, Google Play Store, Kindle Fire Store

- Of course, just Google search "programs like …"
  - "apps", "sites", "tools", etc.

Things I didn't cover

- Video editing, photo editing, photo storage

- Note taking, text editing

- Drawing, diagramming

- Coding, developing apps

- Specific mobile apps (always check to see if there is a mobile version of COTS or SaaS offerings)

- Non-profit discounts. Your Mileage May Vary (YMMV)

Questions?

- What tools have I NOT talked about that you need?

- What are your specific needs as a PTA leader?

- What has worked really well? Share with each other!

- My email: hello@parliamentarypro.com

- THANK YOU!