

**Comox Valley Child Development Association**  
Technology Plan

**Technology Team:**

Joanne Schroeder, Executive Director  
Sandi McDonald, Information Technology Coordinator  
Matt Behrens, subcontractor (Northrock Technologies)  
Rick Baldwin, Technical Consultant

Since April 2003, Sandi McDonald has been the in-house Information Technology Coordinator responsible for researching and recommending new technology, including hardware and software purchases. The Board of Directors reviews and assesses major purchasing recommendations.

The agency works with Matt Behrens of Northrock Technologies to ensure timely and effective support for the technology required by the agency

**Cell Phones:**

The agency owns eleven cell phones. Ten of the cellphones are assigned to specific programs; the other cellphone may be signed out by staff members and is usually located in the reception area. The agency cellphone is available and may also use the automated service Checkmate when staff are out in the community and wish to be monitored for safety.

**Digital Cameras:**

There are two digital cameras available for use within the agency. The Community Integration Program has a digital camera available for the use of the program. The youth involved in these programs use the pictures in various ways, e.g. communication cards, crafts, and social activities. The other camera at the agency is a Fuji FinePix. This camera is stored with the Accounting/Human Resource Manager and is not available to be signed out of the agency. It is used to document agency activities for the agency's website, Facebook, scrapbook, intranet and for newspaper articles.

**DLP Projectors:**

Our newest program, Pathways to Healing, has a new projector for use with their presentations. It is kept offsite at their location at Amethyst House on Duncan street.

The rest of the agency has access to two projectors. The newer DLP Projector was purchased as a backup for the original DLP projector as it is nearing the end of its life. The bulbs for the original projector cost as much as this new projector complete with bulbs so its purchase was deemed prudent in 2011. It is the only projector that connects with our new Administration laptop, so it is now used frequently. The original DLP Projector (purchased in 2004) is still useable by older laptops and has been used both in-house and at other locations to assist in presentations to parents, caregivers, other staff members, and at training sessions.

Both projectors are available for use by any staff member and are stored in the IT Consultant's office along with a sign out log.

**Fax Machine:**

There is one fax machine (Brother MFC-7220) for the agency. It is located in the main reception area. The fax machine is working well and causes little difficulty for the administrative staff. It was purchased in 2009. The toner cartridges are replaced approximately annually.

**Laptop Workstations:**

Currently the agency owns six laptops. One is used by the Behaviour Consultant for TAP, one is assigned to the Coordinator of the Friendship Project, and the other may be signed out by agency staff when on course or when making presentations and attending webinars. The other three are for the members of the Pathways to Healing Program.

**Photocopier/Network Printers:**

New photocopiers/network printers were purchased in April of 2017 both in the main building and the Therapy Centre.

All workstations are able to print to the photocopier/printer/scanner available in the main building reception area and the workstations in the Therapy Centre are also able to print to a small colour scanner/copier located in the main hallway of their building, too. The photocopier toner is supplied as part of the long-term service agreement purchased with the photocopier. All users are provided with an access code that pertains to their program.

**Local Printers:**

The administrative staff have small black laser printers located in their offices as they are used for tasks such as printing cheques, labels, and on letterhead.

The agency also owns a colour inkjet printer that is in use in TAP.

**Scanner:**

The main photocopier also acts as a scanner for use by agency staff members.

**Telephone System:**

The current telephone system, Samsung iDCS, was purchased through IPTS in 2016. The system consists of a main switchboard that is operated and maintained by reception, telephones at each workstation (28), and one in the Boardroom, in the Family Place kitchen area and one in the CIP room. An 'automated telephone attendant' is available to answer calls and provide electronic options for callers to route themselves through the phone system in the event that our receptionist is away from her desk.

In December 2010 we switched service providers from Telus to Shaw as Shaw would provide significant savings over the next three years in long distance charges alone. One line remains with Telus (fax line/security monitoring line) as Telus provides superior service during power outages and is the only type of line authorized for fire alarm panels.

**Video Cameras:**

The agency owns two digital video cameras. The Autism Program uses a Panasonic HC-V100M for: videoing and examining teaching practices; assessing children; sharing with parents, other staff and consultants; also for sharing enjoyment of activities, motivation, and self-teaching videos for children. The digital video camera that is used by the Community Integration Program is a Kodak Handycam. The program uses it to video scenes around town, the group's activities, plays acted by group members, etc.

**Servers:**

The current server is a Dell Server. Back-up procedures for this server are in place and are documented elsewhere in this plan. The server is located in the "computer closet" at the end of the hallway in the main building. The server, a Dell Server running Small Business Server 2016 (Alfred), was installed in April 2016, and is expected to be fully functional and meet the agency's needs for approximately 5 years, requiring replacement in 2020.

**Workstations:**

The staff workstations are made by Dell (OptiPlex 3010). The towers are small and easily placed within confined workspaces. The upgrade in workstations in 2013 was complemented by the replacement of the aging CRT monitors with LED flat screen monitors, as well. With the release of Windows 10 in 2016 we anticipate that the workstations will also require replacement within the next five years as Microsoft phases out support for Windows 7 by January 14, 2020.

**Software:**

Windows Operating systems:       Windows 7 Professional  
  Windows 10 installed on three computers

Office 2010: Word 2010, Excel 2010, PowerPoint 2010, and Outlook 2010.

Office 2013: Installed on two computers

Office 2016: Installed on three computers and three laptops.

Boardmaker: Installed on three workstations (used to make picture cards for use by caregivers and staff members)

**Accounting software:**

After consideration of the cost and benefits of our accounting system Microsoft Dynamics GP 2010, Joanne Schroeder and Jacqueline Moore (Accountant Consultant) approved the replacement of it with Sage 50. This change took place in the fall of 2014.

In another cost saving and efficiency measure, the agency moved from payroll services provided through ADP Payroll Systems to an in-house payroll provided by software called PayDirt and EFT provided through our Royal Bank account. This change was effective January 2015.

**Network set-up:**

The CVCDA is set up with a local area network (LAN). The server (Alfred) stores and backs up (by default) all documents created by program staff.

**Remote Desktop Server:**

In 2016 we implemented a remote desktop server with 10 user licences. This enables off-site workers (ASLP, PTHP) to access files from the network server, collaborate on documents as necessary, and for key staff (ED, IT, Accountant to log in remotely and work from home when necessary). There are no plans to expand this service to other personnel at this time.

**Access policies and protocols:**

Each workstation is set up with User IDs to log in at each workstation. Staff are able to log in at any of the workstation(s) set up for them. The System Administrator has assigned all User IDs and passwords. Administrative staff members know the password for the server. The password for the server is used to log in to occasionally troubleshoot workstation difficulties and reboot the server (usually after extensive Microsoft updates).

In light of awareness and precautions for security on the network, the security risk to the data from outside sources via the Internet is judged to be small.

Each workstation user is set up with administrator rights on the workstation that they use. This will allow them to install programs (e.g. Winzip, or Adobe Acrobat Reader) without requiring the assistance of one of the system administrators. ALL software installation is to be approved prior to installation on the workstations, in accordance with agency policy. This ensures that the agency is in receipt of all documentation and meets up to date licensing requirements, as well as ensuring compatibility with the workstation's operating system and other software currently installed.

**Conditions of Use:**

Access to, and the use of, computer and telecommunications services of the CVCDA are subject to conditions as outlined in the Employee Handbook.

**Back-up Procedures**

Two 4TB removable hard drives are used to back up all files on the server. They are rotated daily and the one not in use is carried home with the IT consultant. There is an automatic reminder emailed to the consultant reminding to make the swap and to confirm which of the hard drives is expected by the backup program.

Automatic reports are also sent via email to onsite IT Coordinator on a daily basis to alert if the back-ups are unsuccessful.

### **Computer Network Maintenance**

The Information Technology Coordinator is currently providing day-to-day computer troubleshooting and maintenance.

Temporary Internet file deletion, cookie deletion, updates for antivirus protection, defragmentation, email clean up, registry clean up and maintenance, emptying of “recycle bins”, physical cleaning of keyboards and monitors, should all be completed on a regular basis by the workstation users. Some of these can be set up as scheduled tasks to be completed automatically on each workstation, and some of these tasks are completed either by a designated staff member or computer technician.

The agency is also committed to ensuring the longest lifespan for each workstation, and as such, on a bi-yearly basis all computers are cleaned inside and out by a reputable firm specialising in this. BSL Computer Cleaning Services is contracted on an annual basis to clean computer fans, keyboards, and telephones.

### **Document services, including centralized databases:**

Databases of addresses for mailing lists such as Service Clubs, Advisory Committees, etc. are not located in a central location, but are stored on the server for use exclusively by the administrative staff.

The email address books for the users of each computer are stored on the server and are therefore backed up nightly as part of the Outlook store file.

The client database management system was purchased and installed in April 2009 from Nucleus Labs. The choice of this database system was influenced by a number of factors including: compatibility with most other child development agencies in BC, receipt of a grant received from MCFD specifying this database for purchase, as well as satisfaction reports from the agencies already using the program. It is a web-based service with its designers and service desk located in the lower mainland. The agency began to consider paperless files in 2012, and August 1, 2013 was the date chosen to move to a paperless system. There is still a need for basic paper documentation in the children’s files (in the case of an emergency during a power outage, etc.), but we are no longer keeping ‘hard copies’ of internal nor received reports. The reports are scanned and filed within the Nucleus Labs Client Management System. External reports are shredded after scanning and uploading are complete.

### **Email:**

CVCDA staff members are using Outlook 2010 as their email program. Most staff members, with the exception of casual and temporary employees, have their own email addresses hosted online at Office365.

### **Type of documents created by staff:**

Most of the documents created by program staff are reports and letters that are destined for parents and other professionals. There are occasional reports to the Board and contributions to newsletters, but in general, most of the documents created pertain to client relations and reporting.

Administrative staff are responsible for creating Board minutes, Telethon minutes, external correspondence on letterhead, notices, statistical reports, etc., so their computer needs are significantly more sophisticated. At this time, the computer software that is installed on all computers is considered sufficient to complete all required tasks efficiently.

Staff began to use electronic time sheets in January 2013. The time sheet template has significantly reduced time and errors in completing time sheets. It also provides roll-ups for HSCIS reporting (July and January of each year) and fiscal year reporting, again significantly reducing time for collating information.

In January 2015, staff began using electronic mileage and expense claim forms which automatically total and extract GST amounts, reducing the workload for the Accounting Manager.

**Staff member competence with Word:**

All staff members are competent with the basics of word processing. They may experience some difficulty navigating through more complicated tasks, but are able to complete the tasks required for their positions. The IT Coordinator has been made available for one-to-one sessions with staff members when they experience difficulty with using the programs.

**Company Website:**

The agency has had a web presence for over 20 years. Through generous donations received in December 2014, the Board approved funding for the new agency website. Dialect Communications was contracted to design and build the new website with a launch date of May 1, 2015. The platform chosen for the agency website is Wordpress, and after initial creation, most content is editable by the IT Coordinator. Since the creation of our website Dialect Communications have refocused their business and do not provide website services any longer. We have contracted with Pod Creative to rebuild the agency website into a totally editable site and to provide consultation and support for both the CVFDA website and the Valleychild website.

We have set up ‘passworded’ areas of the site which host downloadable content by our staff members and Board. The content does not include anything with client information, but will host plans, document templates, etc.

**Company Social Networking Presence:**

During the May 2010 Strategic Planning Session a social networking strategy was designed to increase awareness of our services. The IT Coordinator created a Facebook page and began regular updates on our page in September 2010. With our newly designed website, we are able to achieve an even more coordinated approach encompassing both website and social media. The IT Coordinator is the only person authorised to post to Facebook, based on guidance from the Executive Director. Use of Social Media is guided by the agency Social Media Policy.

We ‘promoted’ (by paying for) advertisements on Facebook for the two weeks prior to the November 2012 to 2016 Telethons. We were able to target the advertisements to a specific demographic, set a limit on how much we were willing to pay each day or week, and modify the ads at any time by changing our postings on the agency Facebook page.

**Client Information and Agency Statistics**

Service delivery statistics are input, managed, and reported using Nucleus Labs. Agency statistics are collected from various sources such as staff weekly schedules, room booking sheets, and attendance records. These statistics are used to guide service delivery and when applying for grants and subsidies.

**Privacy Issues**

A firewall comes as part of the operating system on the server. It has no impact on the day-to-day functionality of the network and the agency, but increases the security of the network and the client files stored on the server. As part of the server upgrade this spring, an additional router with firewall was added to safeguard the server and its files.

Confidentiality is addressed by determining which User IDs may access specific folders on the Server, and as the multiple use workstations have access to the same files within their department, confidentiality is not seen as a problem at this time.

**Funding Sources:**

Outside funding sources for technology projects are available, and the agency has taken advantage of various offers for software at reduced costs for non-profit societies and agencies – for example, recently in the purchase of Microsoft Business Server 2016 and Microsoft Office 2013 through [www.techsoup.org](http://www.techsoup.org), as well as a grant from VIHA to upgrade our client database to Nucleus Labs.

## **Future Requirements/Recommendations:**

### **Summary of Current Status:**

There have been innovative and useful technological strategies implemented within the agency; templates for collaborative reports, and the use of intranet technology to communicate with each other. The importance of current templates for use through Nucleus Labs Electronic Client Record (ECR) system has been re-emphasized with the paperless children's files.

While management is extremely supportive of the efficient use of technology, the agency business focuses on children. Technology is viewed as a means to an end, and as such, there is less priority placed on upgrades and training etc. However, with the in-house training being made available to staff, we are keeping current with the technology in order to allow the staff to work as efficiently as possible.

All staff members are proficient at basic tasks on their computers – email, word processing, Internet research, and they have been educated about the necessity of regular maintenance of their workstations. Tasks such as removing temporary Internet files, cookies, defragmentation of the hard drives, email clean-up, removal of \*.tmp files, removal of “spyware”, etc are not being completed on a regular basis, and in some instances, are not being completed at all. The new operating systems have allowed for more automated tasks, but also require slightly different procedures.

Privacy considerations are constantly under review by the IT team and more secure measures may be recommended as needed. If privacy issues are of concern to a service provider, the system administrator is able to issue a new unique password and the provider assumes responsibility for shutting down his/her workstation whenever they are not present.

The agency now has two completely separate wireless networks (where access to our server is impossible) that were implemented by the end of February 2013. The change in requirements has been driven by the youth and young adults' access and use of technology. These networks are passworded and will not allow any access to our server or our workstations. We have also been pleased to offer free Wi-Fi over the past year and ongoing to the general public through setup of Shaw Go WIFI in both of our buildings at no charge to the agency.

Technology planning, to date, has been on an “as-needed” basis. As the agency has grown, service providers are provided with the necessary tools (both hardware and software) to do their jobs.

### **Recommendations:**

1. Staying current with technology ensures that our systems have the most advanced security features and are compatible with newer innovations and programs. Windows 10 has 'backward compatibility' built in so programs as old as 2003 continue to function as before. However, with the support of Windows 7 being terminated at the beginning of 2020, we need to budget for 30 replacement workstations prior to that time, unless they have been replaced through attrition.
2. Enhancements for the training sessions/workshops that are frequently held in the Family Place would be a motorized drop down screen to allow for clear visuals in digital presentations and a mobile AV cart for presenters.
3. A conference telephone capable of allowing multiple participants to join simultaneously, as well as allow participants on location and remotely to be able to hear each other clearly, is also strongly recommended as an enhancement for the increasing number of conferences and meetings where participants are attending electronically. The cost of these types of telephone ranges between \$700 and \$1000, depending on the features required. As travel costs increase and electronic meetings are more commonplace, this equipment is becoming more necessary.

4. It is also recommended that we explore the feasibility of using an online ticketing site to assist in managing tickets, payments, and receipts – reducing the workload on reception and facilitating a move to electronic integration of all aspects of the accounting system.
5. In order that staff members are able to perform routine maintenance and housekeeping on their own computer workstations short ‘how-to’ worksheets have also been developed. It is recommended that in the quieter summer months each of the workstations is ‘cleaned up’ by the IT Consultant to assist with the processing speed of each workstation.
6. Telethon 2015 was the first year that the Silent Auction items were advertised and open for bidding through an online portal prior to and during most of the Telethon. This seemed to be a successful approach, and it is recommended that we continue to refine this process. It has steadily grown over the past two years and is now an integral part of the annual Telethon
7. As previously mentioned, a new updated, coordinated and enhanced online presence will be necessary to keep pace with the times, as well as engage younger families comfortable with technology. The agency now has a coordinated approach to the website and Facebook page so combining a blog-type format (which will enhance the OASIS newsletter), with visually similar website and Facebook page will meet the expectations of the newer, younger, more technologically sophisticated families and supporters. The move to an online delivery system (rather than snail-mail) of our newsletter OASIS has been well-received.
8. There are opportunities to use technology to advance the agency’s profile in the community and to facilitate presentations to potential funders. A more active Twitter presence, a more focussed approach to Facebook, and a dynamic web presence would all facilitate community engagement with the agency.
9. A comprehensive Social Media Policy has been developed for the agency as well as staff members. There are currently four Facebook pages associated with the agency: the main one, Valleychild.ca, and one for the Community Integration program (CIP) as well as one for Project Inclusion (PI) – formerly known as the Youth Project. Further guidelines need to be developed to keep pace with changing technology and the need to protect the agency’s online/community reputation.