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**Comox Valley Child Development Association**  
Technology Plan

**Technology Team:**

Joanne Schroeder, Executive Director  
Tanner McNabb, Director of Finance and Operations  
Sandi McDonald, Information Technology Coordinator  
Matt Behrens, subcontractor (Northrock Technologies)  
Pieter Vorster (Pod Creative)

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 and Jay Koidhis of Northrock Technologies to ensure timely and effective support for the technology required by the agency, and Pieter Vorster of Pod Creative for website design and support.

**Cell Phones:**

The agency owns 14 cell phones. The autism program also uses its cellphone to video interactions with the children to use with documenting behaviours, changes in behaviours, or to share success stories with the parents. (They are never posted publically.)

OLD:

The agency owns eleven cell phones. Ten of the cellphones are assigned to specific programs; the other cellphone is kept at reception. The phone may be used by consultants to send and receive texts from their clients. Individual programs may also purchase 'pay as you go' cellphone for use on their client visits. The autism program also uses its cellphone to video interactions with the children to use with documenting behaviours, changes in behaviours, or to share success stories with the parents. (They are never posted publically.)

**IPads:**

The agency owns many iPads, all program specific. The Autism program and the SLP program use these devices as learning tools with the children they serve, i.e. voice applications, video rewards, object identification, etc. SCDP has purchased iPads for each of their consultants for use while out of the office on daycare visits. They allow for access via Wi-Fi to update client records, contact information, set meetings through access to their electronic calendars, etc. The apple IDs associated with these iPads belong to the agency and all apps are shared between devices in specific programs.

**Digital Cameras:**

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.

**DLP Projectors:**

Our newest program, Pathways to Healing, has a new projector for use with their presentations. It is kept offsite at their location in Tin Town.

The rest of the agency staff have 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

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- 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 just outside the IT Coordinator's office and sign out/ reservation of both laptops and projectors is done through a shared Outlook Calendar **OLD:**

**Both projectors are available for use by any staff member and are stored in the IT Coordinator'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 ten laptops. One is used by the Behaviour Consultant for TAP, one is assigned to the Coordinator of the Friendship Project, and three others may be signed out by agency staff when on course or when making presentations and attending webinars. The other five laptops are for the members of the Pathways to Healing Program.

**OLD:**

**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 for both 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 can be used to track their copier usage.

#### **Local Printers:**

Most 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.

#### **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.

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.

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**OLD:**

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.

**Conference Calling Hardware:**

A conference telephone (Polycom) 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, was purchased as an enhancement for the increasing number of conferences and meetings where participants are attending electronically. As travel costs increase and electronic meetings are more commonplace, this equipment was becoming more necessary.

**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 **April 2021**. **Changed from 2020 to 2021...5 years.**

**At the beginning of 2019 most of our files and documents were switched to a cloud-based system with only the print services and the accounting software running through this server. It is still routinely backed up daily to a removable hard drive that is carried off site in case of catastrophic accident. <- All added by SM**

**Workstations:**

The staff workstations are made by Dell (OptiPlex 3070). 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 and Microsoft phases out support for Windows 7 by January 14, 2020, all workstations will need to be replaced to Windows 10 Pro. It is also planned to upgrade all workstations to Office 2016 (many of which are still using Office 2013), which can also be obtained through TechSoup Canada.

**Deleted Section: "Software"**

**OLD:**

**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.**

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**Board maker: 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 (former 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.

**See recommendation #6**

The agency is further streamlining accounting procedures and reducing costs by moving toward paying most invoices and payments by direct electronic funds transfer once per month.

**Network set-up:**

The CVCDA is set up with a local area network (LAN). The server (Alfred) stores and backs up (by default) all **accounting files**. **Old wording was “all documents created by program staff”. Changed as those docs are all now stored on the cloud**

**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. 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.

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#### **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 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. (See the agency Service Delivery Plan for more detailed instructions on scanning and uploading.)

#### **Email:**

CVCDA staff members are using Outlook 2016 as their email program. Most staff members, with the exception of casual and temporary employees, have their own email addresses hosted online at Office365. All employees will be using Outlook 2016 to access their email and manage their online calendars

#### **OLD:**

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. With the anticipated upgrade to Office 2016, all employees will be using Outlook 2016 to access their email and manage their online calendars

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

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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 department.

**See recommendation #5.**

#### **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 **or small group 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. We contracted with Pod Creative to rebuild the agency website into a totally editable site and to provide consultation and support for the CVCDA 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 hosts plans, document templates, benefit information, etc. The Board Members Only section has online versions of all Board Meeting documents.

#### **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. Currently our CVCDA Facebook page has 1,475 followers, and our Valleychild Facebook page has 1074 followers. The Communications Director is the only person authorised to post to the CVCDA Facebook page, based on guidance from the Executive Director. With our newly designed website, we are able to achieve an even more coordinated approach encompassing both website and social media. Use of Social Media is guided by the agency's Social Media Policy.

We 'promote' (by paying for) advertisements on Facebook for the two weeks prior to the annual November 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.

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#### **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, Windows 10 Pro, and Microsoft Office 2016 through [techsoupcanada.ca](http://techsoupcanada.ca)

#### **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 few years (and ongoing) to the general public through setup of Shaw Go WIFI in both of our buildings at no charge to the agency.



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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:** All new recommendations are highlighted in Yellow, recommendations 8 – 11 on 2018 technology plan

1. New video cameras and cameras are recommended for the two programs that use them most extensively, CIP and TAP. Both of the ‘adult’ programs are equipped with current cellphones and use their cameras mainly for posting updates to social media.
2. TAP could use a new ipad with tripod for videoing their training sessions with their clients in lieu of the video camera mentioned in recommendation #1. If these are too expensive, they are able to use one of the program ipads, recognizing that it is then unavailable for use by the program for that amount of time, but would still benefit from a tripod that would hold the ipad.. A large LEEF Memory stick would be beneficial so that they could use the Ipads to watch downloaded videos.
3. EIT OT department would benefit from another desktop telephone. Currently there are three people sharing one extension.
4. Through our move from server-based workplace to cloud-based workplace, completed at the beginning of 2019, there are approximately 10 more workstations that have to be replaced. The critical desktop towers have been replaced, but there are more that do not have sufficient hardware to effectively navigate the cloud-based system. These workstations could possibly just have more memory capability added to them, but that seems a waste to be investing in workstations that date back approximately 7 years and are running Windows 7 (due to be retired from support and updates January 2020)
5. Another addition that would be beneficial to facilitate the move to a cloud-based system would be the purchase of a Time, Mileage, Expense tracking program. Currently we are creating multiple versions of these items in an effort to capture the various scenarios present in our two-collective agreement workplace, in addition to the exempt employees who are non-union. The ‘home made’ tracking sheets in Excel do not work well online and employees are required to download them to their terminals to complete and then upload since the online version of Excel that is part of Sharepoint does not recognize ‘editable regions’ and so the entire sheets appear locked, causing much frustration and wasted time.
6. Further software that should be considered is the purchase of a current license or online subscription for Sage 50 – a cost of approximately \$3000. We are currently using a 2015 version which, at times, does not interact well with Windows 10.
7. 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.
8. 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 few years and is now an integral part of the annual Telethon.
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.



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10. 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 Circle 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 through Mail Chimp (rather than snail-mail) of our newsletter CIRCLE has been well-received.
11. 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 will all facilitate community engagement with the agency.