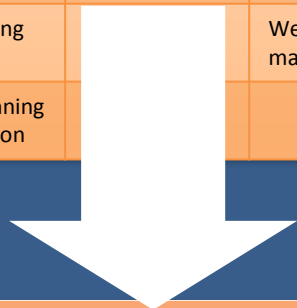


TouchStone Nonprofit Process Library

Fundraising	Volunteer Management	Marketing	Donor Management
Annual Campaign	Volunteer program development	Develop & maintain brand & brand materials	Donation processing
Major Donor program management	Volunteer recruiting	Marketing plan development	Donor database management
Board member fundraising activities	Volunteer recognition and retention	Develop & maintain organization identity package	Donor recognition
Direct Mail campaign	Volunteer management	Public Relations	New donor administration
Telephone campaign	Volunteer Orientation & training	Press releases and SEO	Donor surveys
Grantwriting		Website maintenance	
Event planning coordination			

Strategy	Governance	General Management	Process Management
Vision / Mission Development & execution	Board of Directors Administration	Status / Staff meeting coordination	Process Evaluation
Guiding Principles / Values Development	Board Meeting Coordination	Time Management	Process development & implementation
Partnerships / Alliances Development	Governing Procedures for the Board	Task Delegation & Work Management	Process Innovation
Establish & Maintain Goals & Indicators	Board Committee Structure	Initiatives & Objectives Prioritization	
Self Assessment Tools	Board of Directors Succession Planning	Decision Making	
Organizational Evaluation	Board Retreat		



Volunteer Orientation Toolkit
Work Plans Orientation process / Training process
Checklists New Volunteer Orientation / Orientation Session
Uploaded files Session Content / Training Sessions Volunteer Roles / Contract Agreement Volunteer Handbook
Policy Notes Volunteer Attendance / Training in TouchStone



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Program Management	Program Evaluation	Client Service	Membership Services
Program development & design	Impact analysis	Client satisfaction	Membership enrollment
Program staffing	Evaluation design and reporting	Client service	Membership reporting
Program objectives and goal setting	Program assessment	Quality control	Membership tracking program design
Program reporting		Service workflow	Event calendar maintenance
Program budgeting			

Administration	Human Resources	Finance	Compliance
Office supplies	Performance Appraisal	Financial reporting & analysis	IRS Compliance
Facilities management	Salary administration	Annual Budgeting process	Whistleblower policy
Technology coordination	Employee Handbook	Payroll	Code of Ethics
Travel policy administration	Employee recruiting & hiring	Accounts payable / accounts receivable	Employment law compliance
TouchStone administration	Job description development	Petty cash management	
	Employee Termination	Purchasing	



TouchStone for Nonprofits is a web-based software application that:

- Organizes, streamlines, builds, and links all of your processes to provide structure, consistency, reliability and control across your organization.
- Provides a nonprofit system library containing sample processes and supporting process tools (workplans, checklists, scripts, uploaded files, & policies).
- Links with existing external applications (e.g. CRM, financial systems, etc.)
- Allows management to effectively delegate work and monitor progress, control quality, and resolve problems

TouchStone Implementation

Every nonprofit is unique, with its own set of mission-specific programs, services and practices and its own strategies for success so TouchStone is completely customizable to fit your organization. As a TouchStone client you have your own TouchStone account that you will customize to meet your specific needs.

As you begin to build your TouchStone application, you will evaluate your current processes. If you feel that certain processes function well already – those can simply be uploaded into the application. If you feel you lack certain processes or that some of your existing processes need work, you can access the “Nonprofit Systems Library”. This library contains sample workplans, checklists, scripts, and other process tools. You can add any of these processes and their related tools and customize them to suit your organization.

The library includes not only nonprofit processes like program and service delivery, volunteer administration, fundraising, and board development and governance, but also typical business processes like strategic planning, HR, financial management, communications, etc. Additionally, any process can be built from scratch using TouchStone’s business development tools and added to your TouchStone account.

Every process is then linked to your organization chart so that everyone sees what they and their subordinates are accountable and responsible for.

TouchStone is not designed to replace your donor management system (CRM), membership management application, financial accounting software, or other external systems. Rather it is an integration tool that allows you to build, document, and assign accountability for all of the processes associated with using these external applications. This allows you to make better use of the functionality of these powerful applications.

This nonprofit library will continually be updated with new content that becomes immediately available to all TouchStone nonprofit clients.

TouchStone for Nonprofits - Product Background

Developed by Business Design Corporation for small to mid-sized businesses, TouchStone is a complete business development tool. Partners for Change customized the application and now distributes “TouchStone for Nonprofits”. It has all of the same capabilities as the TouchStone application. But it also includes an enhanced, proprietary library developed specifically for nonprofits.

Business Design Corporation, the owner of the TouchStone Business System, supports clients with:

- Technical support, training services (through live webinars and on-demand training seminars). Email and telephone technical support is always available.
- Free online training via scheduled and on-demand webinars to support implementation of your TouchStone account.
- Systems maintenance and updates and new system releases.
- Complete system security and back-up through Rack Space and VeriSign.
- Membership in the BDC Business Community which gives you access to Business Systems Designers to assist with your implementation.