



# REMOTE PROGRAM DELIVERY

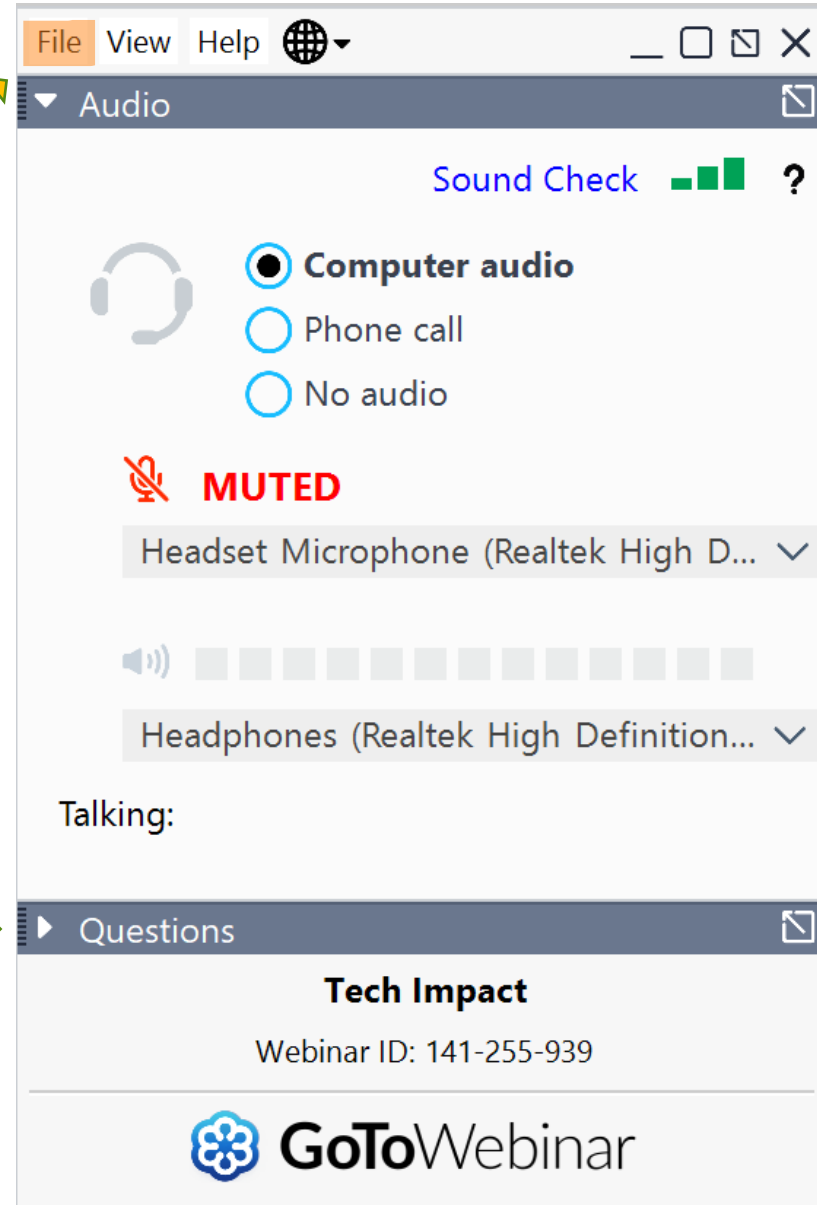
Providing Self-Serve Information

# GOTOWEBINAR INTERFACE

If you cannot hear us speaking, go to:  
**File->Preference->Audio** and check  
your audio settings.

Type all comments/questions into the  
"Questions" panel.

Your interface may display slightly differently.



The screenshot displays the GoToWebinar interface. At the top, there is a menu bar with 'File', 'View', and 'Help' options. Below the menu bar, the 'Audio' panel is visible, featuring a 'Sound Check' button with a green bar and a question mark. The audio settings are set to 'Computer audio', with 'Phone call' and 'No audio' options also present. A red microphone icon with a slash through it indicates the microphone is 'MUTED'. Below this, there are two dropdown menus for selecting audio devices: 'Headset Microphone (Realtek High D...' and 'Headphones (Realtek High Definition...'. A 'Talking:' indicator is located below the device selection. At the bottom of the interface, the 'Questions' panel is visible, showing the webinar title 'Tech Impact' and the 'Webinar ID: 141-255-939'. The GoToWebinar logo is displayed at the bottom right of the interface.

**OUR MISSION IS TO EMPOWER  
COMMUNITIES AND  
NONPROFITS TO USE  
TECHNOLOGY TO BETTER  
SERVE OUR WORLD.**



# We do this by delivering tech services, education, and training that help nonprofits and communities thrive.



## **NONPROFIT TECH SERVICES:**

- Managed IT Support
- Cloud Services
- Strategic Consulting
- Security & Compliance
- Data Support
- Machine Learning & AI
- Community Integrated Design



## **NONPROFIT EDUCATION & TRAINING:**

- Reports
- Consumer Guides
- Assessments
- Workbooks & Articles
- Online Training
- Free Webinars



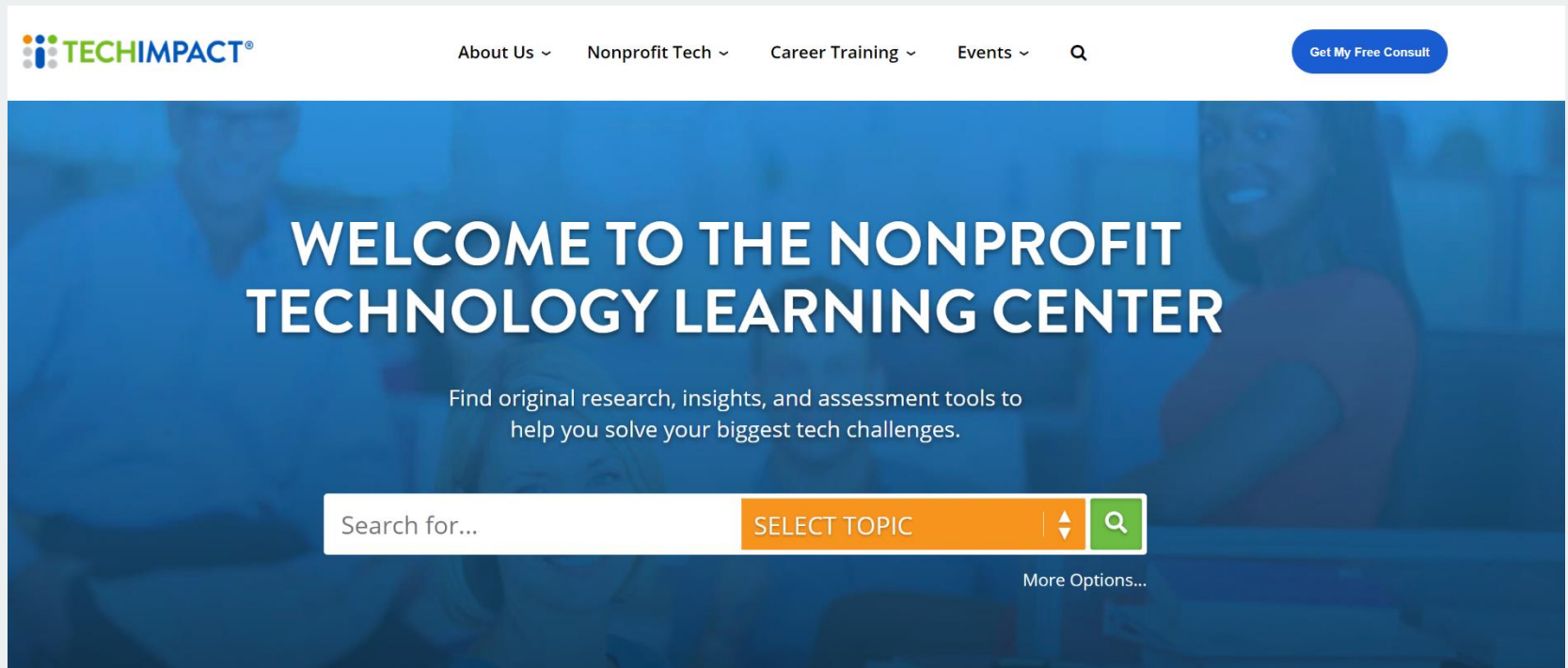
## **WORKFORCE DEVELOPMENT:**

ITWorks & CXWorks: Free IT and Customer Experience training programs

PunchCode:  
12-week immersive programming bootcamp



# TECH IMPACT'S TECHNOLOGY LEARNING CENTER



The screenshot shows the homepage of the Tech Impact Technology Learning Center. At the top left is the Tech Impact logo, consisting of three colored dots (blue, green, orange) followed by the text "TECHIMPACT®". To the right of the logo are navigation links: "About Us", "Nonprofit Tech", "Career Training", and "Events", each with a downward arrow. Further right is a magnifying glass icon for search. On the far right is a blue button with white text that says "Get My Free Consult". The main content area has a blue background with a blurred image of people. In the center, the text "WELCOME TO THE NONPROFIT TECHNOLOGY LEARNING CENTER" is displayed in large, white, bold, uppercase letters. Below this, a smaller line of text reads "Find original research, insights, and assessment tools to help you solve your biggest tech challenges." At the bottom of the main content area is a search bar with a white input field containing the text "Search for...", an orange button labeled "SELECT TOPIC", a dropdown arrow, and a green search button with a magnifying glass icon. Below the search bar is a link that says "More Options..."

[www.techlearningcenter.org](http://www.techlearningcenter.org)

# COURSE PAGE:

<https://offers.techimpact.org/course-page-remote-program-delivery>

Course Page

## Course Page - Remote Program Delivery

**Please bookmark this Course Page. It will be consistently updated with the information you need to access the webinars, slide decks, and recordings.**

**Thank you for joining us for this course.**

Important Information:

- GoTo Webinar is our webinar platform. You will receive email reminders with login information for each session, or you can find the links on this page.
- Every session will be recorded and available to individuals who have registered for the course.
- Be sure to add [training@techimpact.org](mailto:training@techimpact.org) to your contacts to ensure meeting details do not get caught in your spam folder.

## Remote Delivery

This course  
the following

- **Tuesd**  
**EST: P**
- **Wedn**  
**PM ES**
- **Thurs**  
**EST: B**



## KIMBERLY SANBERG

Owner, Cairn Strategies

Pronouns: She/Her

I help nonprofits fundraise, engage supporters, build awareness, and achieve their goals with strategic digital marketing and communications, including social media, website strategy, advertising, and email.





# REMOTE PROGRAM DELIVERY

Providing Self-Serve Information



# AGENDA

1. What is Remote Program Delivery?
2. Defining Your Goals & Audience
3. Benefits of Self-Serve Information
4. Your Website & E-Learning
5. Simple Expert Systems (AI)
6. Pros & Cons To Self-Serve
7. Homework

# WHAT IS REMOTE PROGRAM DELIVERY?



post tv

#WOC  
IN  
TECH

## DEFINITION

A remote program is a service provided that does not require in-person participation.

- Webinars
- Knowledge Bases
- Chatbots
- Guides on Your Website
- Instagram Live





## WEB-BASED SELF-SERVICE

"Web-based self-service is online customer service and support...

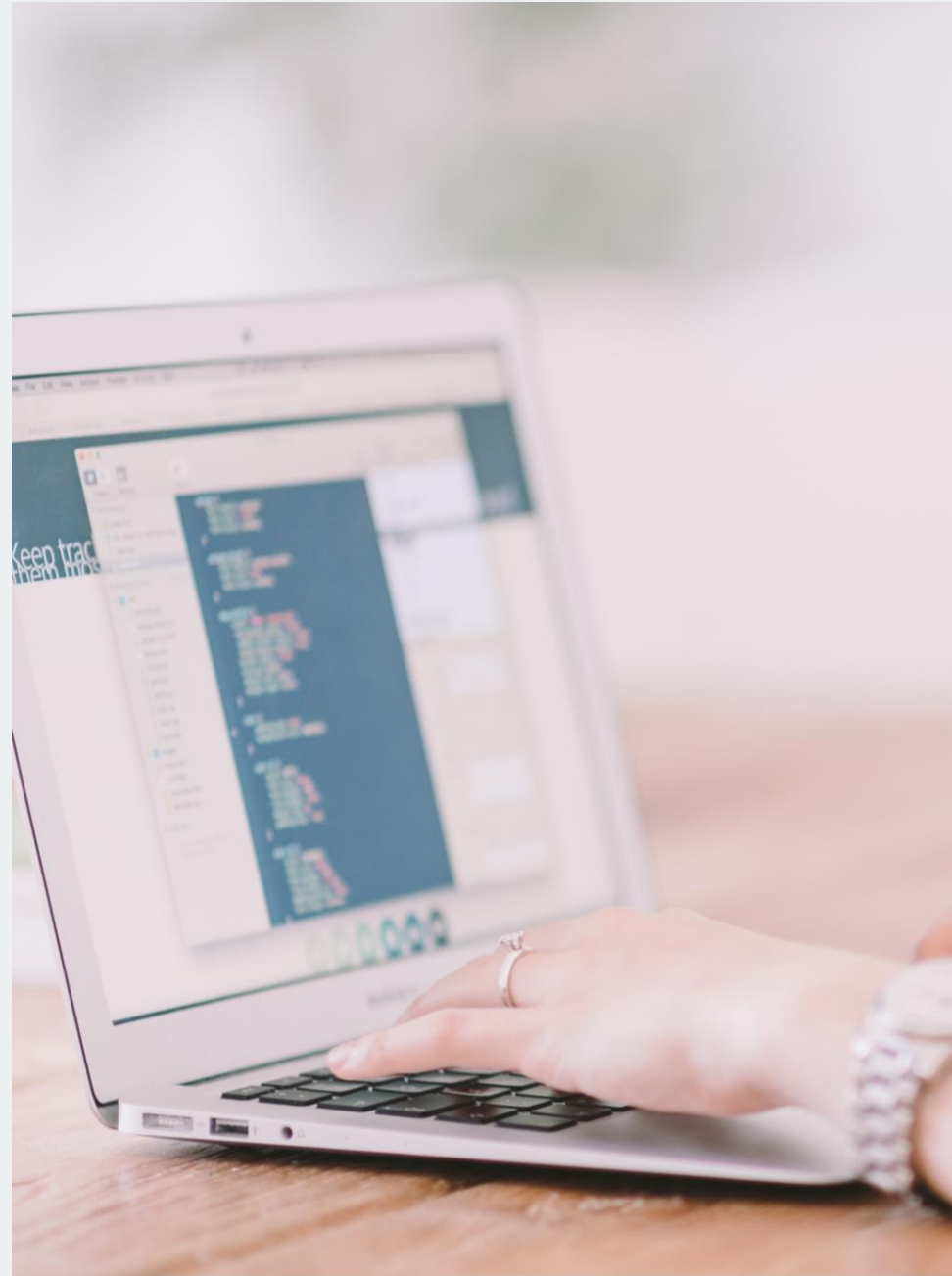
This allows customers to find the answers and resources they need without ever having to speak with another person."

Source: HubSpot



# YOUR FAQ PAGE ISN'T ENOUGH

- A searchable knowledgebase
- A blog or other section of your website that's regularly updated
- Video tutorials or tips
- An email series that includes “how to” messaging following registration
- A well-organized, easy to navigate website





# INNOVATION IN REMOTE PROGRAM DELIVERY

# NONPROFITS HAVE ALWAYS BEEN INNOVATIVE

New technology resources, as well as COVID-19, have changed the way nonprofits are able to offer programs.

The inability to have in-person programs calls for another moment of innovation for the nonprofit sector.





# EXAMPLE: INVISIBLE PEOPLE (1/2)

They use social media and chatbots to connect people to services and collect basic information.



## WAV Homeless Peer Support Group

Private group · 1.3K members

Join Group



Source: [Invisible People Facebook](#)



# EXAMPLE: INVISIBLE PEOPLE (2/2)

**Invisible People**  
@invisiblepeopletv · Nonprofit Organization

Donate

Home About Fundraisers Videos More ▾

Like 🔍 ⋮

**About** [See All](#)

- i** Invisible People is a 501(c)3 nonprofit dedicated to educating the public about homelessness through innovative storytelling, news, and information.
- i** The Invisible People story begins with its Founder, Mark Horvath: "I once heard a story about a homeless man on Hollywood Blvd who really thought he ... [See More](#)

67,162 people like this including 2 of your friends

**Create Post**

Photo/Video Check in Tag Friends

**Invisible People** 13h · 🌐

Lavane's dog is her life. Lavane says she would never be able to survive homelessness if it wasn't for her dog. Sadly, the London hostels that allow pets are all full. Like many homeless people, Lavane would rather sleep outside than separate from her dog.

Remote case management reduces workload for case managers and makes data entry more efficient. It also reduces the need for people experiencing homelessness to wait long hours to receive services.

Source: [PBS](#), [Stanford Social Innovation Review](#) [Wikimedia](#)



Minnesota Zoo

March 24 at 2:28 PM · 🌐



Today we're sharing a bear training session with you! There are many different types of training, but the one we focus on the most at the zoo is called "husbandry training." This type of training is important for not only giving the animals enrichment, but also for preparing them for routine medical exams, like getting blood drawn, checking teeth, and trimming nails.



Watch together with friends or with a group

Start



504

32 Comments 102 Shares

# EXAMPLE: MINNESOTA ZOO

Live video streaming (vs. a recorded video) is a way for audiences to interact with the zoo in real time.

The Bear Training is a day-to-day activity that was shared virtually through Facebook Live and Instagram Live.

# INTO THE CHAT

Share an example of a time your organization was innovative with program delivery.







# DEFINING YOUR GOALS & AUDIENCE



# HAVE S.M.A.R.T. GOALS

**S** : Specific

**M** : Measurable

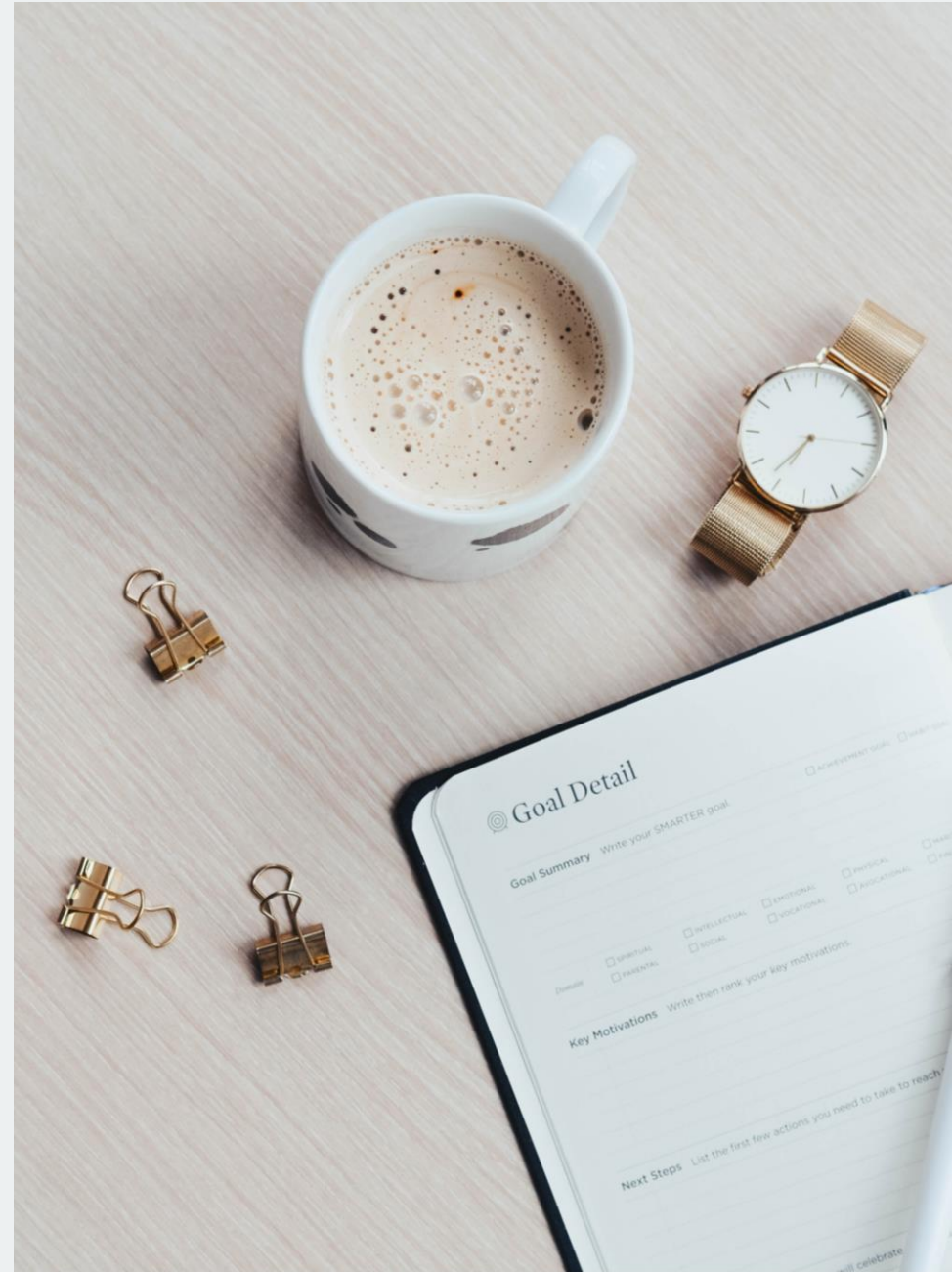
**A** : Attainable

**R** : Relevant

**T** : Timely

# WHAT ARE YOUR GOALS?

- What kind of program (one-on-one services, community events, learning opportunities) are you offering remotely?
- What do you hope to achieve?





# WHO ARE YOU TRYING TO REACH?

- What do you know about your clients/supporters?
- What type of information are they looking for?
- Where do they get their information?
- What platforms do they use?





# MEET PEOPLE WHERE THEY ARE.

You can have the most amazing new program, but if no one can find it, it won't help people.

Where are your clients?

If you don't know, ask them.

# INTO THE CHAT

What goals do you have for delivering remote programs generally? For providing self-serve information specifically?





# BENEFITS OF SELF-SERVE INFORMATION



# EXPANDS YOUR CAPACITY

How many clients and constituents are you *not* reaching because you don't have time, or they don't know about your resources?



# INFORMATION IS AVAILABLE WHEN CLIENTS NEED IT

Clients often need immediate answers and timely support.



# LOWERS BARRIERS



For many, it's less intimidating to look up information than to speak to someone about it.



# IT'S EFFICIENT

Sometimes it's the most efficient way to connect people to the resources they need.

Self-serve information can be a standalone resource or a gateway to your organization's broader services.



# IT EXPANDS YOUR REACH



Fundamentally, you can help more clients through self-serve resources.

# HOW TO USE YOUR WEBSITE

post tv

#WOC  
IN  
TECH





# ANSWER QUESTIONS ASKED FREQUENTLY

Documenting frequently asked questions (FAQ) or key issues and posting them online is a smart place to start.



# MAKE THE INFORMATION CLIENT-CENTRIC

Focus your content and page design on what your clients need most.

CLS is accepting new clients by phone only. Call 215-981-3700 to get legal help.  
Please click here for more information.

Center City Office: 1424 Chestnut St. Phila, PA 19102 | North Philadelphia Law Center: 1410 W. Erie Avenue Phila, PA 19140

f t i in SEARCH



HOME

SERVICES

SPECIAL PROJECTS

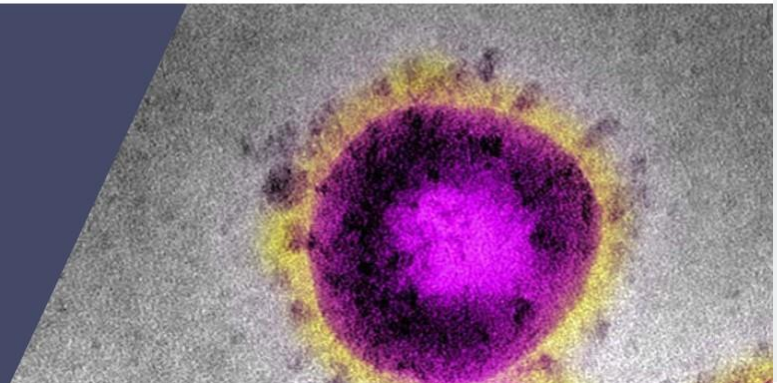
NEWS & ISSUES

ABOUT

HIDE MY VISIT

DONATE

CLS IS CONTINUING TO SERVE THE LEGAL NEEDS OF PHILADELPHIANS DURING THE CORONAVIRUS PANDEMIC.



# THINK ABOUT BOTH BROWSE AND SEARCH

Can clients navigate the site intuitively? Are the search terms in the language they would typically use?

CLS is accepting new clients by phone only. Call 215-981-3700 to get legal help.  
Please click here for more information.

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f t i in SEARCH



HOME

SERVICES

SPECIAL PROJECTS

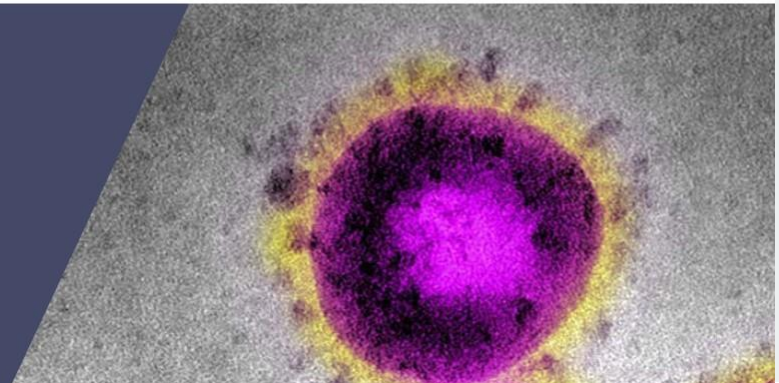
NEWS & ISSUES

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***drawing a pension, but I can't locate my former employer. What should I do?***  
*Common pension problems. People move and forget to notify former employers or they move, merge, or go out of business and lose track of former employees. Locate the address of a person who can help you locate a lost pension, especially if internet access is not available. Contact your local public library or senior center. Many libraries and senior centers have information on how to locate a lost pension.*

*One of the best ways to locate a lost pension is to search your personal records. If you have any old papers from your former employer, contact the pension plan administrator. If you have old income tax returns, you may be able to locate the pension plan administrator's address on a W-2 form. If the address is no longer a good one, you may be able to locate the pension plan administrator by searching for the employer's name, by using telephone books and catalogues of local libraries, or by contacting the U.S. Postal Service for a forwarding address. If you cannot locate the pension plan administrator, write a letter requesting information about the pension plan and your former employer.*

*If you are a former co-worker, talk to them. Find out if they are drawing a pension. If a former co-worker is drawing a pension, you may not be vested in the pension. If you are not the plan administrator, it will be able to give you the plan administrator's name and address. If a former co-worker is drawing a pension, you may not be vested in the pension. If you are not the plan administrator, it will be able to give you the plan administrator's name and address. If you are not the plan administrator, it will be able to give you the plan administrator's name and address. If you are not the plan administrator, it will be able to give you the plan administrator's name and address.*

*Informational returns with the Department of Labor. Information is reported on a Form 5500. You can also print a copy of a Form 5500 from the eForm5500 website and locate a Form 5500 under a former employer's name, then contact the pension plan administrator and request an individual benefit statement. It is important that communications with pension plan administrators be kept in a file. It is also important to send letters of inquiry by certified mail so that the letters were received.*

#### ***My pension plan was terminated. What should I do?***

*If your employer went out of business or merged with another company, the pension plan may be terminated. A number of things can happen. Most commonly, benefits will be distributed as lump sum payments or annuities for vested plan participants. Upon termination, the Pension Benefits Guaranty Corporation (PBGC) that all vested benefits have been paid out in the form of lump sum payments. In some cases, the plan administrator has been unable to locate a participant, the PBGC will attempt to locate the participant so that he or she can contact the PBGC to claim the benefit.*

*Some pension plans are terminated because the plans are underfunded. That is, there is not enough money in the pension plan to pay benefits to all vested participants. If an underfunded terminated plan was insured by the PBGC, you can contact the PBGC to see if pension benefits are due. The PBGC may also be able to help you locate the administrator of a terminated plan. The PBGC can be contacted toll free at 1-800-400-7272.*

***Not receiving my pension, but I believe that the payments are lower than they should be.***  
*Check with the pension plan administrator for calculating pension benefits. Each pension plan is different. Plan administrators can help you determine if you are receiving the correct amount. However, pension plan administrators are not responsible for calculating pension benefits.*

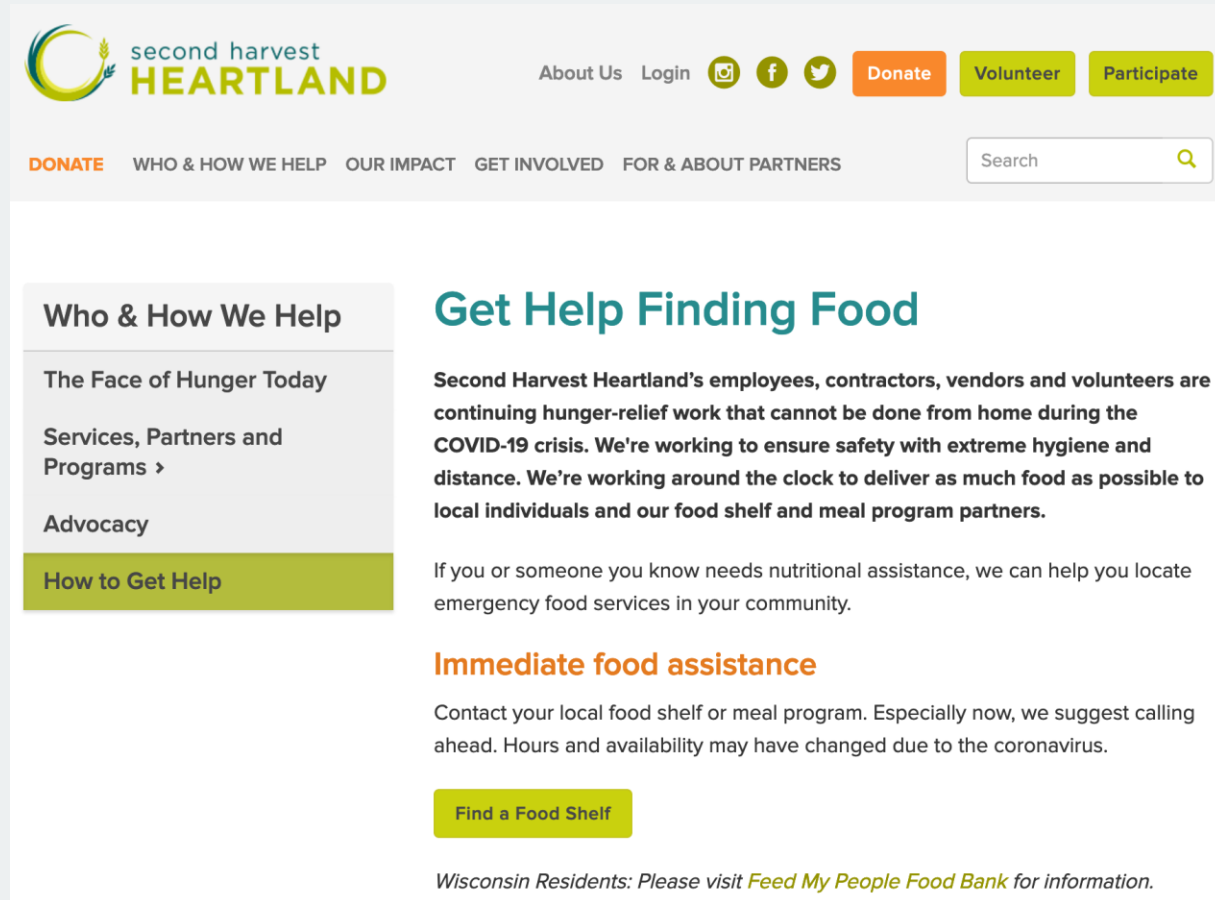
# BODY COPY: KEEP IT SHORT.

It's often worse than leaving out details. Website visitors are likely to click away from this without learning anything.



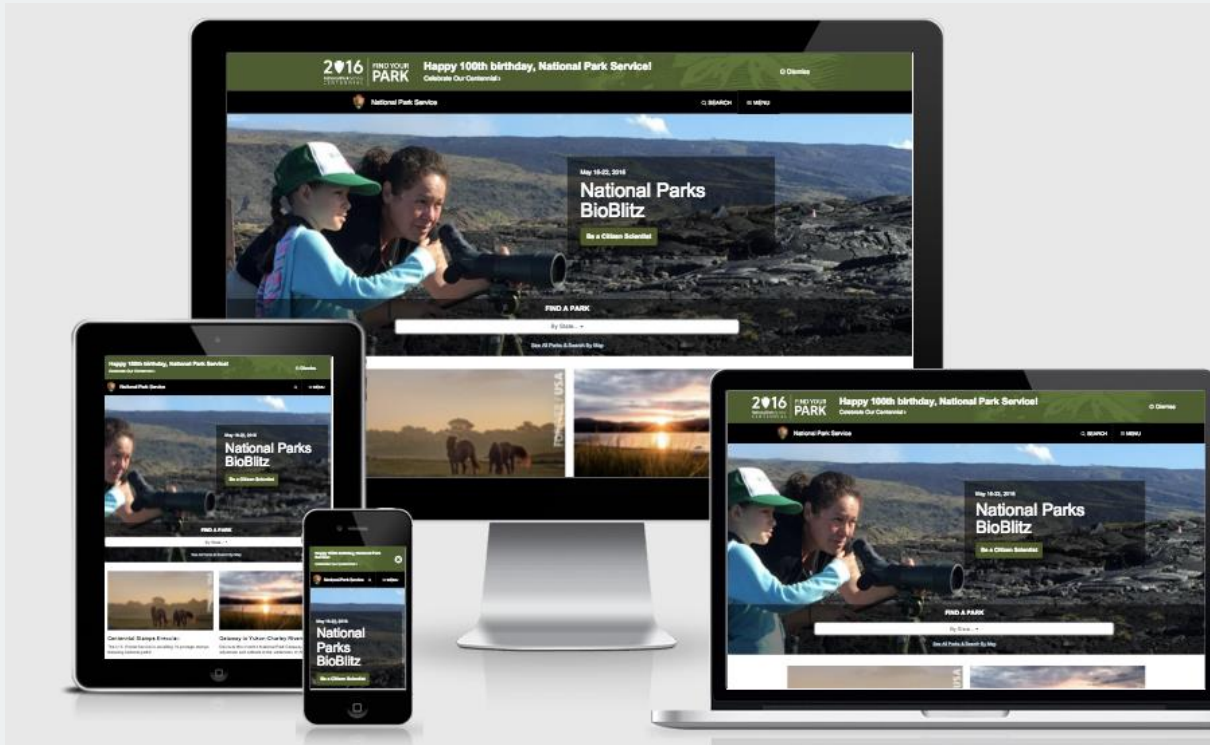
# FORMAT TEXT FOR EASE OF SCANNING

- Use header text
- Use bullet points and numbered lists
- Keep paragraphs short
- Embed images and video
- Use buttons
- Hyperlink text



The screenshot displays the website for Second Harvest Heartland. At the top left is the logo, which consists of a green circular icon with a wheat stalk and the text 'second harvest HEARTLAND'. To the right of the logo are links for 'About Us', 'Login', and social media icons for Instagram, Facebook, and Twitter. Further right are three buttons: 'Donate' (orange), 'Volunteer' (green), and 'Participate' (green). Below the logo and navigation is a horizontal menu with links: 'DONATE', 'WHO & HOW WE HELP', 'OUR IMPACT', 'GET INVOLVED', and 'FOR & ABOUT PARTNERS'. A search bar is located on the right side of this menu. The main content area features a sidebar on the left with a menu titled 'Who & How We Help' containing links for 'The Face of Hunger Today', 'Services, Partners and Programs >', 'Advocacy', and 'How to Get Help' (which is highlighted in green). The main content area has a heading 'Get Help Finding Food' in green. Below this heading is a paragraph of text: 'Second Harvest Heartland's employees, contractors, vendors and volunteers are continuing hunger-relief work that cannot be done from home during the COVID-19 crisis. We're working to ensure safety with extreme hygiene and distance. We're working around the clock to deliver as much food as possible to local individuals and our food shelf and meal program partners.' This is followed by another paragraph: 'If you or someone you know needs nutritional assistance, we can help you locate emergency food services in your community.' Below this is a sub-heading 'Immediate food assistance' in orange, followed by a paragraph: 'Contact your local food shelf or meal program. Especially now, we suggest calling ahead. Hours and availability may have changed due to the coronavirus.' At the bottom of this section is a green button labeled 'Find a Food Shelf'. A final note at the bottom of the page reads: 'Wisconsin Residents: Please visit [Feed My People Food Bank](#) for information.'

# YOUR WEBSITE MUST BE RESPONSIVE



Responsive websites change based on the screen size and orientation of the device being used to view it.

# CONSIDER WHEN IT'S BEST TO USE PDF'S

A page on your website is usually easier to navigate – especially on a phone – and is more likely to turn up in a search.

The exception is if your clients will want to print the information or read through it like they would a publication. Then, having a PDF can be useful.





# MAKE IT INTUITIVE

- Don't bury the content so that people can't easily find it.
- Use categories and organization that make sense to people outside of your nonprofit.
- Think about how real people navigate from one page to another.



# EXAMPLE: THE TREVOR PROJECT

Need help? We are here for you 24/7: [1-866-488-7386](tel:1-866-488-7386) | [Text](#) | [Chat](#)

**THE TREVOR PROJECT** [Get Help](#) [Education](#) **[Resources](#)** [Get Involved](#) [About](#) [Blogs & Events](#) [Donate](#)

[We Are Hiring](#) [f](#) [t](#) [@](#) [t](#) [v](#)

## RESOURCES


# TREVOR SUPPORT CENTER

Welcome to the Trevor Support Center, a place where LGBTQ youth and their allies can find answers to frequently asked questions, and explore resources related to sexual orientation, gender identity and more! Remember, if you need immediate support or help, Trevor's counselors are just a **phone call, chat,** or **text** away. You are not alone.

 <b>Asexual</b>	 <b>Bisexual</b>	 <b>Coming Out</b>
 <b>Family + Friends</b>	 <b>Gay + Lesbian</b>	 <b>Glossary</b>

# EXAMPLE: AMERICAN FOUNDATION FOR SUICIDE PREVENTION

**Are you in a crisis?** Call [800-273-8255](tel:800-273-8255) or text [TALK](sms:TALK) to 741741.

 American Foundation for Suicide Prevention

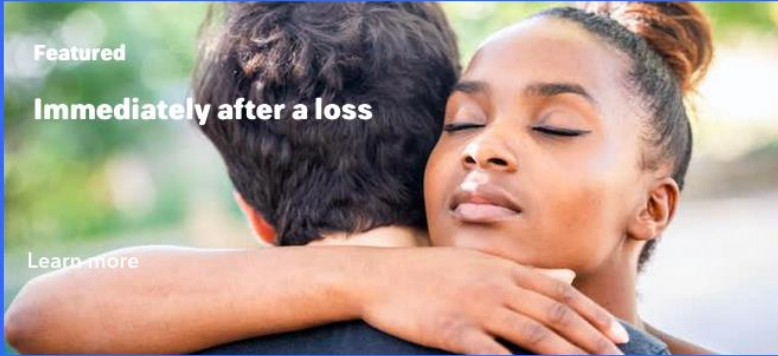
[Real Stories](#) **[Get Help](#)** [Make a Difference](#) [Join a Local Chapter](#) [Learn the Facts](#) [Donate](#)

[I'm having thoughts of suicide](#) [I've survived an attempt](#)

[I've lost someone](#) [I'm worried about someone](#)

[Find treatment](#) [Find a suicide loss support group](#)

**Featured**  
**Immediately after a loss**  
[Learn more](#)



# POLL

Is your website optimized so that your self-service resources are easy for clients to find and use?

- A. Yes, it's great.
- B. Sort of, but it could be better.
- C. No, we have a lot of work to do.





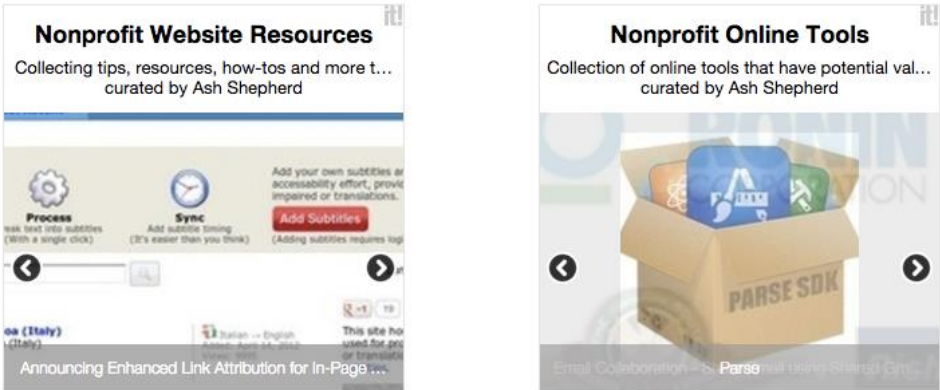


# E-LEARNING




# CURATE E-LEARNING CONTENT

I like a bit of content curation. I share a lot of resources through Twitter but you can also keep up with my efforts on a couple topics on Scoop.it below.



The screenshot shows two curated collections on Scoop.it. The first collection, 'Nonprofit Website Resources', is curated by Ash Shepherd and contains items like 'Process' (max text into subtitles) and 'Sync' (add subtitle timing). The second collection, 'Nonprofit Online Tools', is also curated by Ash Shepherd and features a 'PARSE SDK' tool represented by a cardboard box with various icons inside.

Plan  Learn

Learn more about how we can help you meet your online engagement goals.

**Word on the Street**

"I was pleased to work with Ash - he has a great reputation among nonprofits in the Seattle area, and he lived up to it!"

~Katherine Sather~

**Social Media Road Map**

Gathering content from elsewhere can give your site a boost. Graphics and images help get the message across.

# RECORD LIVE WEBINARS

Recording webinars hands you a viable self-serve resource. Most offer this feature.

- GoToWebinar
- Demio
- WebEx
- Zoom





# CREATE SCRIPTED VIDEOS

A 60-minute live session can be turned into a 10-minute video.

# CREATE CUSTOM E-LEARNING

- Camtasia
- Articulate
- Adobe Captivate

These tools allow you to bring together PowerPoint, screencasts, audio, video, and interactive elements such as polls and quizzes.

**WELCOME TO THE NONPROFIT TECHNOLOGY LEARNING CENTER**

Find original research, insights, and assessment tools to help you solve your biggest tech challenges.

Search for... **SELECT TOPIC** |

[More Options...](#)

**[Making the Case for Tech: A Nonprofit Workbook and PowerPoint Template](#)**

*Make a compelling argument to convince funders, board members, executive staff, or peers to support new technology for your nonprofit.*

**[Remote Program Delivery](#)**

08/21/2020 • 1:00 pm EDT

**[Training Calendar](#)**

View our listing of live and scheduled training sessions.



# STRAIGHTFORWARD E-LEARNING MODULES

Home Live

## ○ Introduction to Tactical Tech Planning

### ○ Overview Learning Objectives

#### Welcome to Tactical Tech Planning!

*Idealware's On Demand Tactical Technology Planning* will help you out of the technology doldrums and help you assess your organization's technology infrastructure and address your current and future needs. When you complete the training, you'll have a fully realized tactical technology action plan to guide your nonprofit. With it, you'll be able to solve your current technology issues, and better equipped to tackle future challenges.

This course is made up of five key sections:

- Getting Started
- Infrastructure
- Data
- Online Communications
- Action Plan





# HOW TO USE VIDEO

# CREATING VIDEOS

A reasonable investment in a microphone, lighting, and using your phone camera, it's easy to film short clips of staff offering tips or walking viewers through a process.





# THE TOOLS YOU'LL NEED

- Camera
- Audio/Microphone
- Tripod
- Lighting
- Editing software



# BEFORE YOU RECORD, ASK YOURSELF:

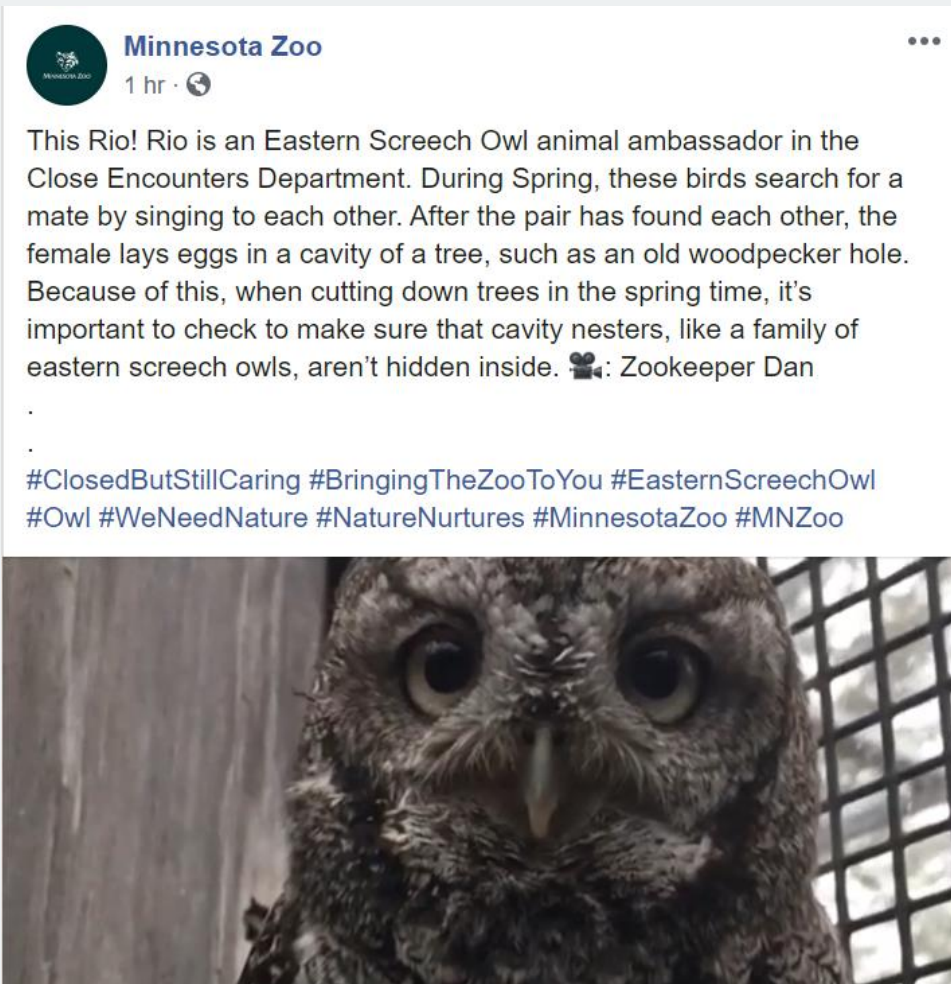
- Where will we share our video (social media, YouTube, website)?
- Who is our audience?
- Would long-form (10+ min) or short-form (0-10 min) video work best for our goal?



# VIDEO CAPTURE

The Minnesota Zoo features a daily animal video on Facebook and Instagram to continue animal education.

This is an example of a short-form video created without professional equipment.



# BEST PRACTICES

Keep it simple. Don't worry about the cool and overwhelming video and filters, etc.

Hook the viewer in the first 3-7 seconds.

Add subtitles. YouTube can add them automatically, but Facebook and Instagram do not.

Consider allocating budget to YouTube, Facebook, and LinkedIn to help you target an audience.



# INTO THE CHAT

How does your organization use video? Do you find it's effective?



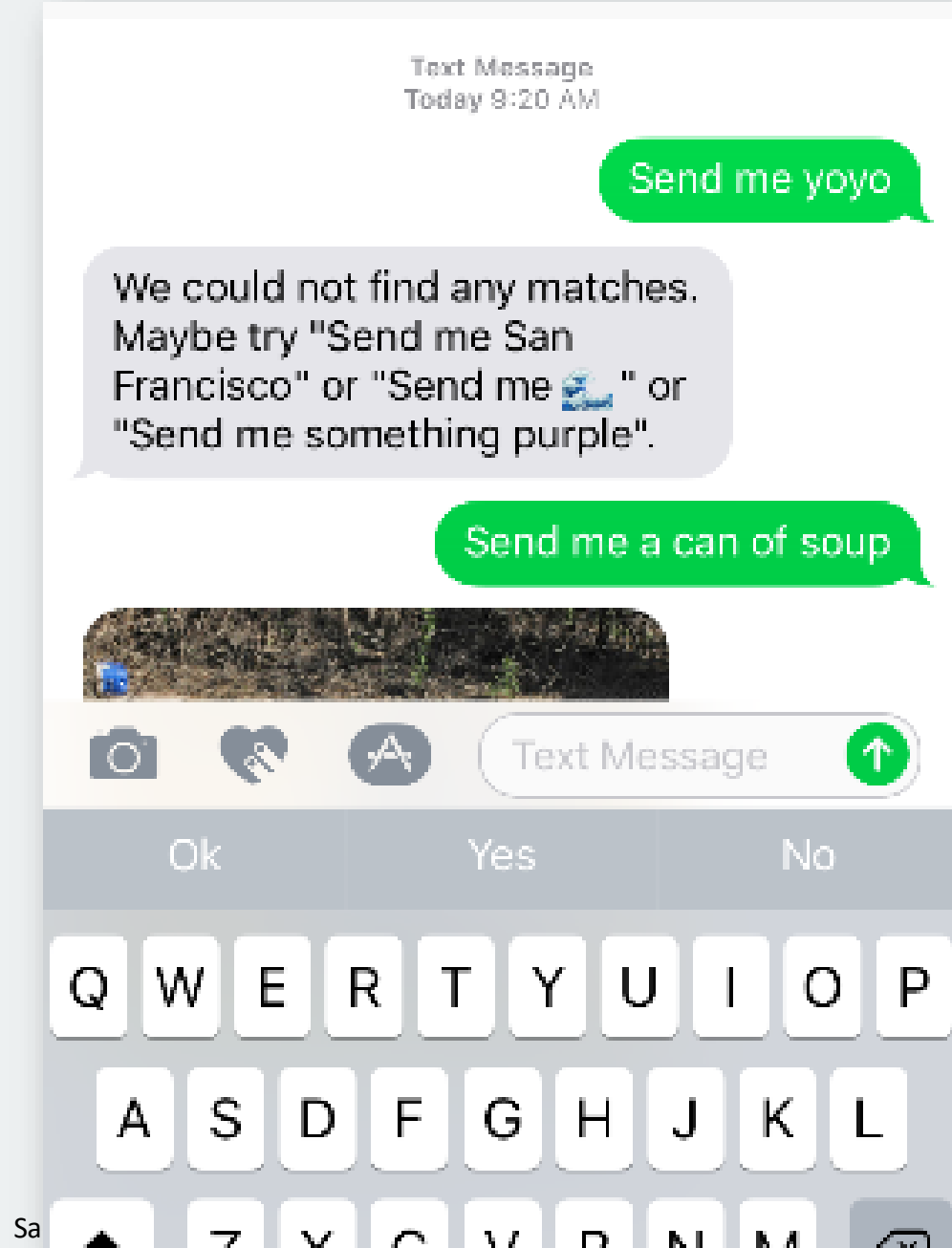




# SIMPLE EXPERT SYSTEMS (AI)

# SIMPLE EXPERT SYSTEMS

A Simple Expert System is a (not complex) program that uses a set of rules to give answers to questions.



# CHATBOTS

Ex. The World Health Organization (WHO)

WHO built a bot on WhatsApp to share information on the COVID-19 Pandemic.

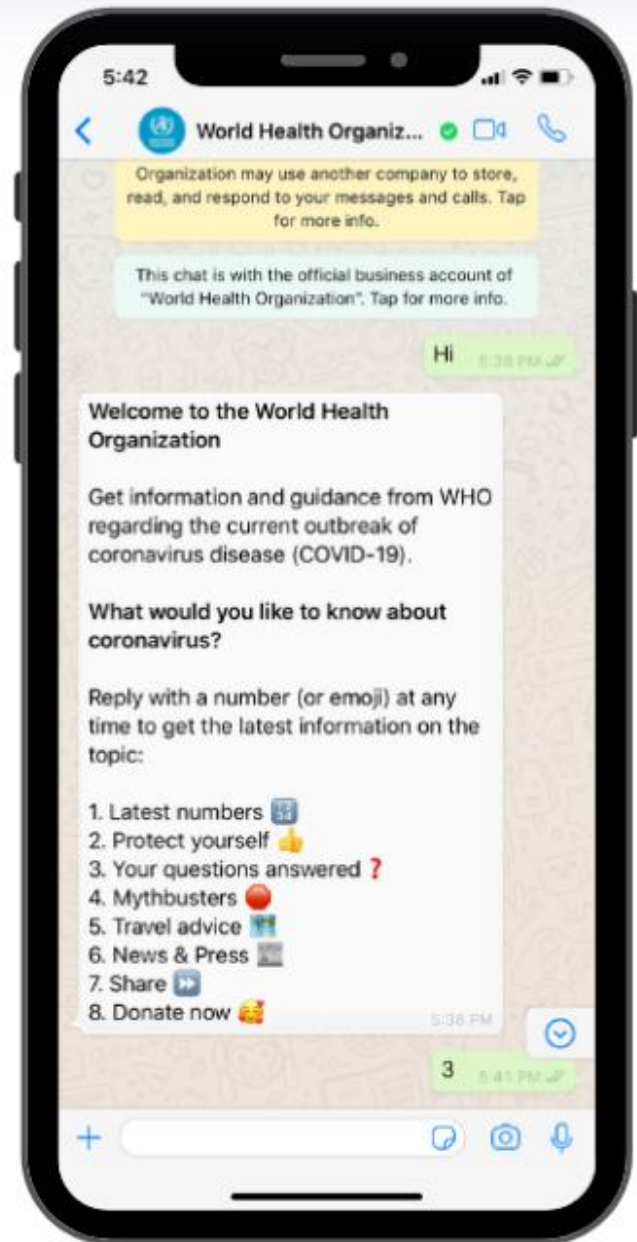


Image Credit: [ManyChat](#)



Tech Impact



Hi there! I am a virtual assistant for Tech Impact here to help you.

Are you a nonprofit looking for assistance?

Yes - I am a nonprofit

No

Write a message



# CHATBOTS BENEFITS

- Engage new demographics
- Attract new donors
- Answer specific questions



# USES FOR CHATBOTS

- Interactive FAQs System
- Fundraising
- Online Storytelling
- Encourage Audience Action
- Human Resources





# CHATBOT TOOLS

- [ManyChat](#)
- [Chatfuel](#)
- [Bots for Charity](#)

# BROADCAST TEXTING

Distribute alerts, educational messages, contact information, words of encouragement, anything that may provide help or instruction.



# ADDITIONAL EXPERT SYSTEMS

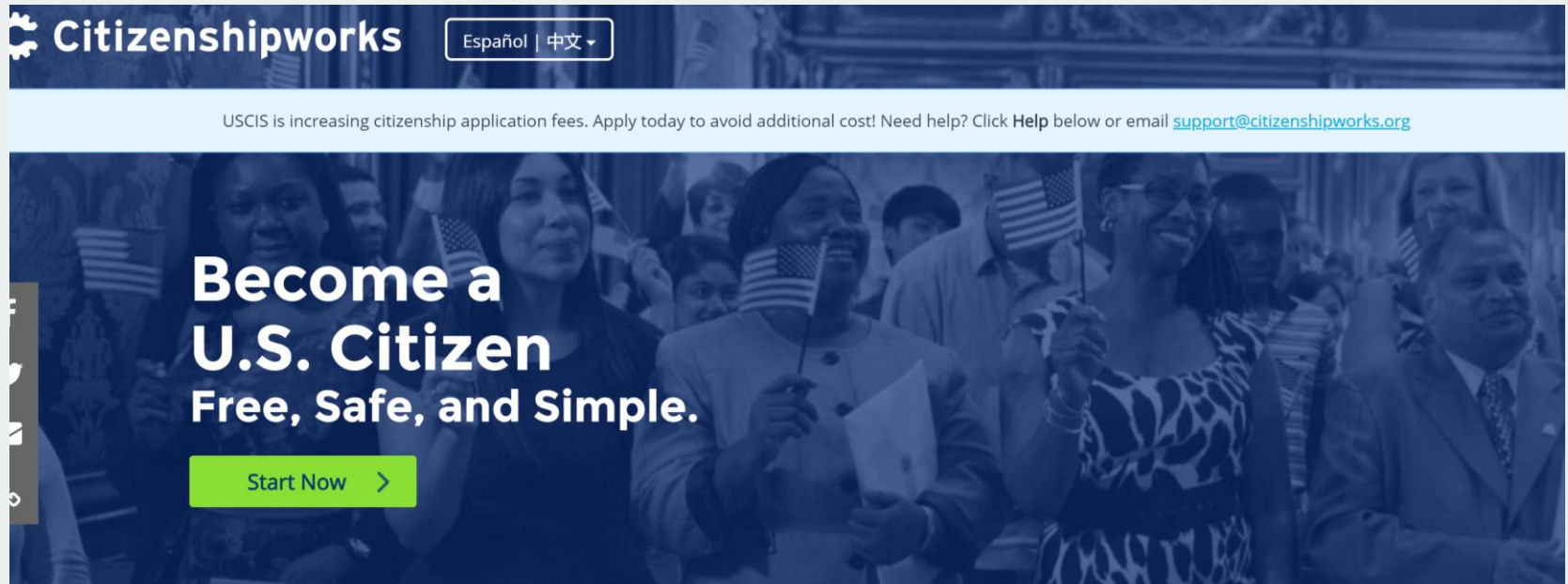
The screenshot displays the Hotdocs Simple Will interface. On the left is a blue sidebar with navigation options: Options, Document preview, Answer summary, and Help. The main content area shows a form for 'John Smith Simple Will' with an 'Outline' section listing testator information and children. A modal window titled '1: Courtney Smith' is open, showing a form with the following fields:

- First Name: Courtney
- Middle Name: (empty)
- Last Name: Smith
- Date of Birth: 11/14/1980
- Child Gender: Female (dropdown menu)
- Child is from: (radio buttons for Current marriage and Prior marriage)
- Date of Birth: 11/14/1980

It's not as expensive as you might think to provide calculators, decision trees, or document assembly online.



# EXAMPLE: DOCUMENT ASSEMBLY



The screenshot shows the homepage of Citizenshipworks. At the top left is the logo "Citizenshipworks" with a gear icon. To its right is a language selection menu with "Español" and "中文" options. Below the header is a light blue banner with the text: "USCIS is increasing citizenship application fees. Apply today to avoid additional cost! Need help? Click Help below or email [support@citizenshipworks.org](mailto:support@citizenshipworks.org)". The main content area features a large blue-tinted image of a diverse group of people holding small American flags. Overlaid on this image is the text: "Become a U.S. Citizen Free, Safe, and Simple." Below this text is a green button with the text "Start Now" and a right-pointing arrow.

Immigrants fill out basic information and create a legal, ready-to-file form.

# DOCUMENT ASSEMBLY TOOLS



- Hotdocs
- Smokeball (mainly for lawyers)
- TheFormTool
- Documate

Hello! Title this interview here... Save



Interview Output Documents

Page 1 of 6

Name this Page here...

1	Question	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Edit	Variable Name	<input type="text"/>	<input type="text"/>
	Logic	Required <input checked="" type="checkbox"/>		

2	Question	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Edit	Variable Name	<input type="text"/>	<input type="text"/>
	Logic	Required <input checked="" type="checkbox"/>		

# EXAMPLE: VIRTUAL ASSISTANT TECHNOLOGY

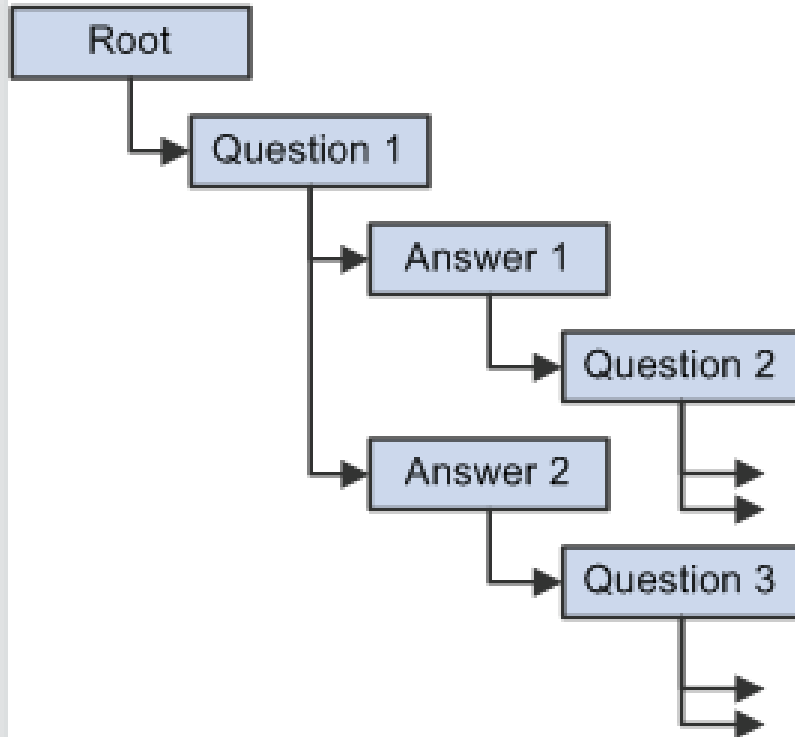


The screenshot shows the Alexa skill page for "Audubon Bird Songs" by the National Audubon Society. On the left is a circular logo featuring a bird in flight and the word "Audubon". To the right, the skill title "Audubon Bird Songs" is displayed in large black font, followed by "by National Audubon Society" in a smaller font. Below this is a star rating of 4.5 out of 5 stars with 124 reviews. The text "Free to Enable" is shown in red. Two speech bubbles are visible: one containing the command "Alexa, ask Audubon to play a Bald Eagle" and another partially visible one containing "Al" and "Ame".

The Audubon Society created an Alexa skill to teach bird calls. You can request a bird call by saying: "Alexa, ask Audubon to play an American Robin" or "Alexa, ask Audubon what a Northern Cardinal sounds like."

# INTERACTIVE ASSESSMENTS

## Branch Script



Advanced form builders or survey tools can help you create branching assessments.

- TypeForm
- FormSite
- FormStack



# SELF-HELP LEGAL SERVICES

Initial screening to identify options. Plus a learning center, and legal referral search feature.



The screenshot shows the homepage of the IMMI website. At the top left is the IMMI logo, which consists of two stylized human figures in green, followed by the text "Simple and free information for the immigrant community". Below the logo is a green navigation bar with three links: "WHO IS IMMI", "TAKE THE QUESTIONNAIRE", and "INFORMATION CENTER". A dark grey banner below the navigation bar contains the text "TPS Update 11/12/19 - New extensions for TPS expiration dates for El Salvador, Haiti, Honduras, Nepal, Nicaragua". The main content area features a large heading "Do you know your way to legal status?" in a bold, dark grey font. Below the heading is a paragraph of text: "More than 1.5 million people are eligible for immigration benefits and do not know it. Answer these questions to discover your path." Underneath this text is a prominent orange button with the text "Answer These Questions" in white. At the bottom of the main content area, there is another paragraph: "Immi legal experts help immigrants learn about their rights and options. Your answers are protected and private."

**imm** Simple and free information for the immigrant community

WHO IS IMMI TAKE THE QUESTIONNAIRE INFORMATION CENTER

TPS Update 11/12/19 - New extensions for TPS expiration dates for El Salvador, Haiti, Honduras, Nepal, Nicaragua

## Do you know your way to legal status?

More than 1.5 million people are eligible for immigration benefits and do not know it. Answer these questions to discover your path.

[Answer These Questions](#)

Immi legal experts help immigrants learn about their rights and options. Your answers are protected and private.

Source: Immigration Advocates Network: IMMI.org

# INTO THE CHAT

Has your organization tried any of these types of automated tools, like chatbots or online screening? If yes, what was your experience like?





**IN CONCLUSION**

# CONNECTING REMOTELY WILL BE DIFFERENT THAN CONNECTING IN PERSON



Program delivery may be more challenging remotely.



# THE ADVANTAGE IS REACH AND SAFETY

- You can provide information to a lot of people.
- During the pandemic, it's not always safe to meet in person.
- Align your staff's innovation and creativity skills with available technology tools.

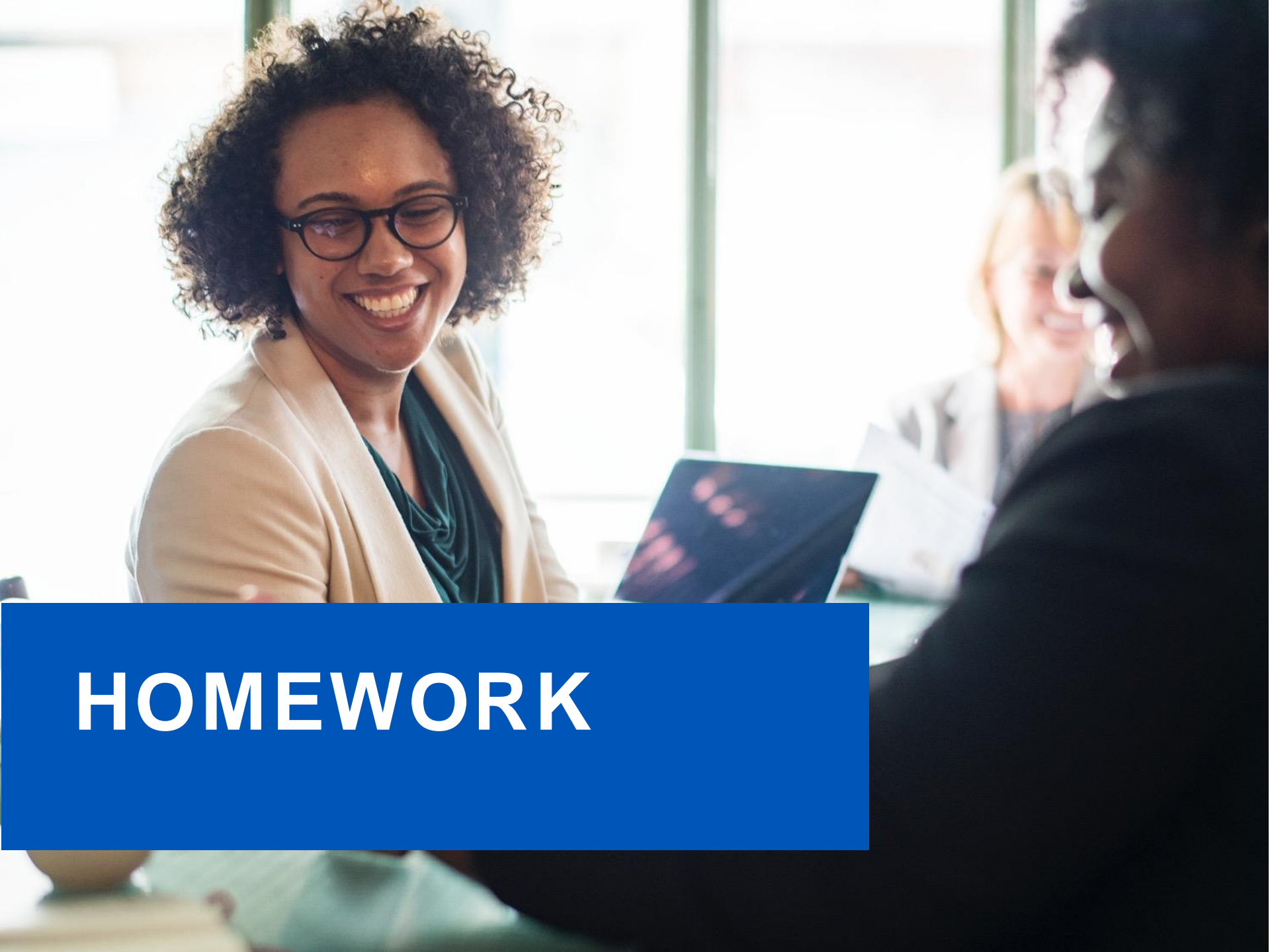




## THE TRADEOFF CAN BE TRICKY FOR STAFF

Acknowledge that managing a self-serve system is different from one-on-one help.

Seek the staff members who are interested in transitioning how you provide services.



# HOMework





# HOMESWORK ASSIGNMENT

Think about which of your programs you can make "self-serve" for your clients, then send the following information to [training@techimpact.org](mailto:training@techimpact.org) by 10:00 AM Eastern on Tuesday.

- Brief description of the program.
- Who is the audience?
- Which tools will you use?
- How will you measure success?





# QUESTIONS?

Next Session

Helping Clients Remotely

Wednesday, September 23  
1-2:30 PM EST



THANK YOU

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TECHIMPACT.ORG