



TREADWELL

Better data. Greater impact.

Monthly Event Topic:

QUALITY ASSURANCE: MONITORING AND MAINTENANCE

Presenters:

Team Treadwell
October 18, 2023

Team Treadwell

- 126+ Years of Nonprofit or Data Experience
- 200+ Clients in the last Year
- 4 Countries served:
 - US, Canada, UK and Australia



Treadwell's Core Values

Impact through Technology:

We simplify and leverage integrated technology to help nonprofits improve the lives of their clients and the community through performance-based measurement systems.

Unbiased, Client-focused, Independent:

While we have relationships and partnerships, we are staunchly independent. In the course of consultation, we always place our clients' needs above our own desires and any third parties' interests.

Innovation:

We are artists/creators/engineers/innovators. We creatively use the tools that we have at our disposal and develop/identify new tools to better achieve solutions for our clients.

Personal Fulfillment:

We are a community who celebrates, appreciates and empowers each other's personal and professional fulfillment and self-actualization.



Unbiased



Client-focused



Independent



Passionate

Getting to know you

- Your Name
- Organization
 - Location
 - Mission and Services
- Your role within your organization
- Intro Questions
 - One thing you love about Apricot/ETO
 - One thing that you wish were easier in Apricot/ETO

Monitoring and maintenance

TODAY'S TOPIC

Purpose of Today's Call

- Equip administrators with tools
 - Front End
 - Reporting (Standard and Custom)
- Quick and Easy Wins
- Data Informed Decision to Drive Configuration Changes
- Hear From You

apricot

- Things your group discusses
 - Front End Features
 - Custom Reports

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- Things your group discusses
 - Front End Features
 - Custom Reports

Questions to the group

- What is something you are taking away from today's discussion?
- Are there any challenges that surface from this discussion?
- What, if any, successes have you seen in the early stages of monitoring?

Questions

Managed Services Program Benefits

- Base Managed Services
 - Consultation
 - Support Coordination
 - System Monitoring
 - Access to exclusive monthly Treadwell events
 - Discounts on additional services
- Tiered Services
 - Professional service hours
 - Access to Treadwell's network of experts
 - Credits towards advanced features

August's Call

Special Guest: Julie Bianchi
Grant Writing for Tech Capacity

November 15, 2023
1 PM Pacific | 4 PM Eastern