

the Counseling Center

Virgil Roberson, M.Div., L.P., NCPsyA Executive Director | **Jane Benjamin, Ph.D.** Clinical Director

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Board of Directors
Bronxville Rotary

Counseling Center currently uses Excel spreadsheets to track and contact donors. These are difficult to manage in groups. They take a great deal of administrative time and don't lend themselves to modern communications and tracking.

An effective "Software as a Service" database would save time, cut costs, and provide an effective basis for future fundraising and communications.

The best database for Counseling Center is called Little Green Light (www.littlegreenlight.com). It costs approximately \$500 per year, (depending on the number of records). It's modern. It accomplishes the following:

- Quickly replace excel spreadsheets
- Generate mailing lists
- Take donations online and record them to the donor record
- Integrate easily with the web site
- Be available to multiple users via the web
- Excellent security
- Send Emails to lists
- Generate Letters
- Automate thank-you notes and emails and perform other routine communications
- Other advanced functions

Step 1: License Little Green Light (www.littlegreenlight.com)

Thatcher Drew will perform this task pro bono in the name of Counseling Center

- This requires that we use a Counseling Center Credit Card.

Step 2: Upload the Spreadsheets (pro bono)

- Thatcher Drew will upload the current spreadsheets at no cost to Counseling Center. Thatcher owns a company 501square.com that helps non-profits with databases of this kind.

Step 3: Training & Operations (\$2,150)

There are many options for operations and training depending on the personnel involved. Counseling Center will make informed decisions concerning personnel over the next few months. In all cases the personnel will need to be trained. This involves online tutorials and the presence of a consultant to answer questions.

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Fortunately, a very good group of about 25 Little Green Light consultants are available to partner with Counseling Center personnel. They work remotely and are paid by the hour. Alternatively, a web-savvy Bronxville person could support the system.

The next steps would be:

1. Obtain spreadsheets from Office Manager
2. Have dialogue with Office Manager about spreadsheets
3. Thatcher massages spreadsheets for upload.
4. Group reviews spreadsheets.
5. Open a monthly account with LGL
6. Thatcher uploads spreadsheets.
7. Review the results
8. Convert to a yearly account with LGL
9. Recruit a consultant or employee to run the system

Step 4: Mailing & Communications (\$1,500)

Counseling Center needs to add to its list of potential donors by engaging with a mailing house and expert in donor data sources. We estimate that this would cost approximately \$1,300 in the first year and then self-fund thereafter.

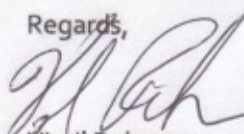
Step 5: Miscellaneous (\$350)

This amount is to cover surprises. For example, we may use it to enhance our computer, document scanning or other facilities.

Summary

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| Annual Two Year Database/Licensure Fee | \$1,000 |
| Training & Operations | \$2,150 |
| Mailing & Communications | \$1,500 |
| Miscellaneous | \$ 350 |
| Total | \$5,000 |

Regards,


Virgil Roberson
Executive Director