

# Online Tools

# Introduction for Nonprofits



These training materials have been prepared  
by Aspiration.



# Who is Aspiration?

- ▶ Aspiration helps nonprofits and foundations use software tools more effectively and sustainably.
- ▶ We serve as **ally, coach, strategist, mentor** and **facilitator** to those trying to make more impactful use of information technology in their social change efforts.
- ▶ [www.aspirationtech.org/services](http://www.aspirationtech.org/services)

# Coming Up

- ▶ Review common types of nonprofit tech tools
- ▶ Look at how to connect them to your work
- ▶ Understand their place in the larger ecosystem

Web Sites

Donations

Events

Email Blasting

Advocacy

Contacts

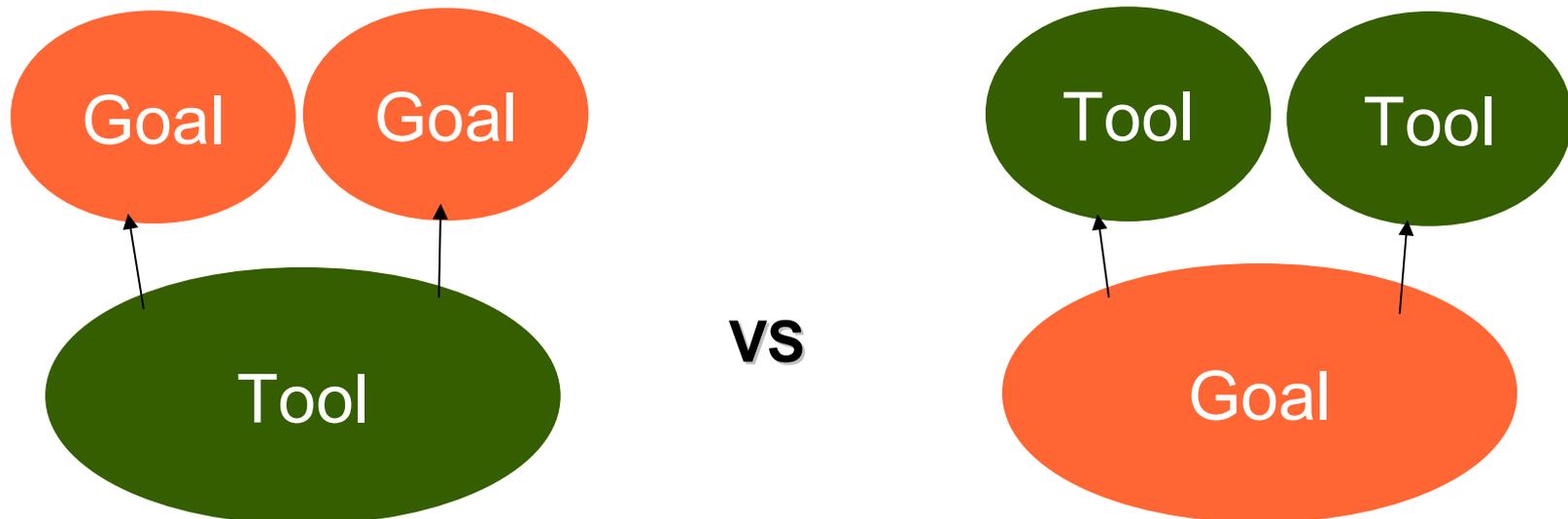
Multi-Function Tools

Project Management

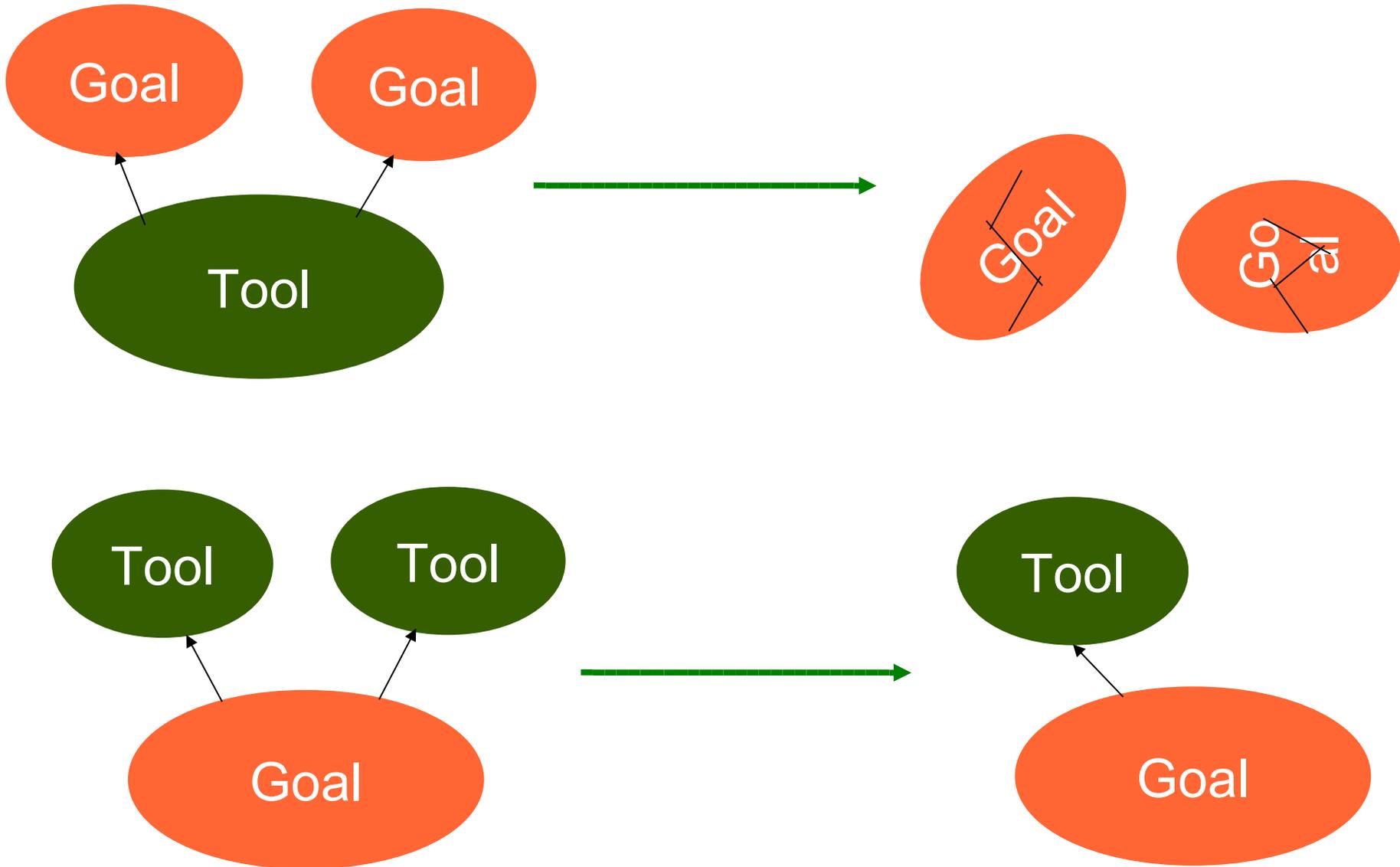
Social Media

# What are your goals?

- ▶ Measurable
- ▶ What does success look like?
- ▶ Tool-Agnostic
  - ▶ Make sure your communications plan stays in tact when the tool you are using fails you



# Tool Agnostic?



# Example Nonprofit Goals

Goal	Measurability	What does success look like?	Tools
Increase donations through online efforts for scholarships	<ul style="list-style-type: none"><li>• Can ask people how they heard</li><li>• Track referring link of Donation Thank You page</li></ul>	2 scholarships funded through online efforts	<ul style="list-style-type: none"><li>• Web Site</li><li>• Facebook</li></ul>
Increase attendees at annual event through online efforts	<ul style="list-style-type: none"><li>• Compare this year's attendance to last year's</li><li>• Have a "How'd You Hear" place on registration</li></ul>	10% increase in attendance from last year	<ul style="list-style-type: none"><li>• Twitter</li><li>• Texting</li></ul>

# Data > Tools

- ▶ Think of tools as impermanent
  - ▶ Tools fall away, data (hopefully) stay
- ▶ Data is the most important organizational asset
  - ▶ Content
  - ▶ Contacts
  - ▶ Process
- ▶ Plan for tech divorce when you choose a tool

# Data > Tools

- ▶ Open Source Tools
  - ▶ Anyone can view the underlying software code
  - ▶ Little or no licensing cost, upgrade costs
- ▶ Community Supported
  - ▶ Mission-driven, not profit-driven
- ▶ Open source tools leave you in a leveraged position with your data
  - ▶ You're not tied to a specific person or company

# Web Sites

- ▶ Manage, organize and create web site content
  - ▶ Content Management System (CMS)
    - Manage a web site with a visual interface (buttons, WYSIWYG) rather than digging into raw code (HTML, CSS, PHP)

## ▶ Common Examples:

- ▶ Wordpress
- ▶ Drupal
- ▶ Joomla



WORDPRESS

# Web Sites

A screenshot of the WordPress dashboard. At the top, it shows the site name "Social Source Commons Blog" and navigation icons for updates (2), comments (3), and a "New" button. The left sidebar contains a menu with items like "Dashboard", "Home", "Updates", "Akismet Stats", "Posts", "Media", "Links", "Pages", "Comments", "Appearance", "Plugins", "Users", "Tools", "Settings", "Digg Digg", "StatPress", and "E-Mail". The main content area is titled "Dashboard" and includes a "Right Now" summary table, theme information, and sections for "Recent Comments" and "Plugins".

Content	Discussion
137 Posts	235 Comments
5 Pages	176 Approved
12 Categories	0 Pending
339 Tags	59 Spam



## Home Administration

- > **Dashboard**  
View and customize your dashboard.
- > **Content**  
Find and manage content.
- > **Structure**  
Administer blocks, content types, menus, etc.
- > **Appearance**  
Select and configure your themes.
- > **People**  
Manage user accounts, roles, and permissions.
- > **Modules**  
Extend site functionality.
- > **Configuration**  
Administer settings.
- > **Reports**  
View reports, updates, and errors.
- > **Help**  
Reference for usage, configuration, and modules.

# Donations

- ▶ Accept and manage donations
  - ▶ Online Donation Processors
    - Allow you to accept donations through your web site
  - ▶ Peer to Peer Fundraising Tools
  - ▶ Donor management Tools
    - Allow you to manage donors as contacts with information attached



- ▶ Common examples:

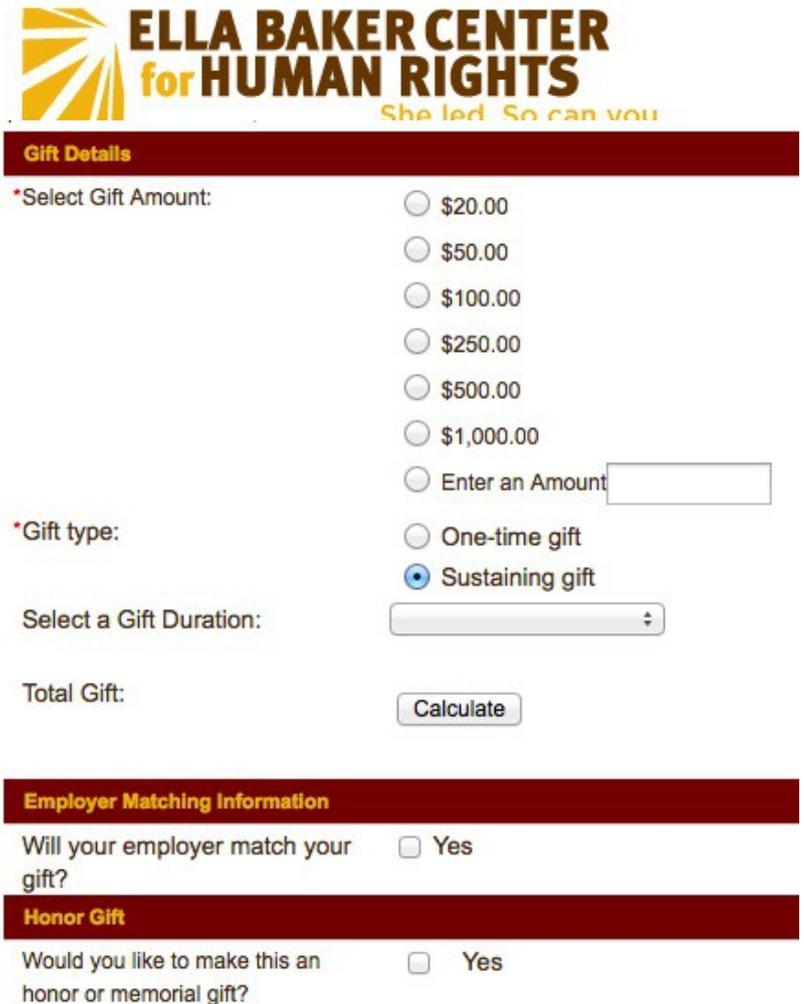
- ▶ Network for Good
- ▶ Click & Pledge
- ▶ Razoo



# Donations

## ▶ To Consider:

- Monthly Giving
- Employer Match
- In-Kind Donations
- Look & Feel of your web site



**ELLA BAKER CENTER  
for HUMAN RIGHTS**  
*She led. So can you.*

**Gift Details**

\*Select Gift Amount:

\$20.00  
 \$50.00  
 \$100.00  
 \$250.00  
 \$500.00  
 \$1,000.00  
 Enter an Amount

\*Gift type:

One-time gift  
 Sustaining gift

Select a Gift Duration:

Total Gift:

**Employer Matching Information**

Will your employer match your gift?  Yes

**Honor Gift**

Would you like to make this an honor or memorial gift?  Yes

# Events

- ▶ Create online event registration forms and manage participants
  - ▶ Event Management Tools
    - Create, embed events
    - Accept registrations and payment
    - Manage registrants
  - ▶ Form builders
    - Create forms that visitors can fill out on your web site
- ▶ Common examples:
  - ▶ Eventbrite
  - ▶ Evite
  - ▶ Facebook Events
  - ▶ Wufoo

# Events


Tickets sold: **51,531,924**
[Create Event](#)
[My Events](#)
[My Profile](#)
[My Tickets](#)
[My Contacts](#)
[Account](#)

## March 1: Building a Social Media Dashboard

Thursday, March 1, 2012 from 12:00 PM to 1:00 PM (PT)

San Francisco, CA | San Francisco Nonprofit Technology Center

Find Attendees:  [Find](#)

[Manage](#)
[Edit](#)
[View](#)

[Unpublish](#)
[Copy](#)
[Cancel](#)
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### EVENT SUMMARY ▶

#### REGISTRATION

- [Collect Custom Information](#)
- [Event Type & Language](#)
- [Add News and Updates](#)

#### ANALYZE

- [Charts](#)
- [Event Reports](#)
- [Cross Event Reports](#)
- [Google Analytics](#)

#### ATTENDEES

- [Add Attendees](#)
- [Email Attendees](#)

<b>Status</b> Status: Completed <span style="color: red;">●</span> Page Views: 67 <a href="#">reset</a> Sold: 15 Pending: 0 <span style="background-color: #007bff; color: white; border-radius: 50%; padding: 2px;">?</span> Available: 0  100%	<b>Total Sales</b> Gross Sales: \$ 0.00 Eventbrite Fees Owed: - \$ 0.00 <b>GRAND TOTAL:</b> \$ 0.00	<b>Invitations Stats</b> Email Invitations Sent: 0 Resulting Transactions: 0 Conversion Rate: 0% Bounces: 0 Unsubscribes: 0 Complaints: 0
---	--	---

ORDER #	TICKET BUYER	QUANTITY	PRICE	DATE	PAYMENT
<a href="#">71456275</a>	Jennifer Kelley	1	\$0.00	Feb 23, 2012	Free Order
<a href="#">70523991</a>	Anukul Gurung	1	\$0.00	Feb 19, 2012	Free Order

# Email Blasting

- ▶ Send organizational emails to large lists of constituents
  - ▶ Email Blaster or “Broadcast” Email Tools
    - Largely protects you from being blacklisted for spam
    - Gives you analytics based on sends, lists
    - Allows you to put together professional-looking emails (relatively) easily
- ▶ Common examples:
  - ▶ Vertical Response
  - ▶ Constant Contact
  - ▶ MailChimp

Tip:

Outlook is your evil master

# Email Blasting



0 Available Survey Responses

Home Emails Postcards Surveys Events Lists Tools Community Account Help



Welcome Aspiration

Drag and drop below to customize your home page

## Reports

Name	Type	Launch Date	Sent	Open	Click	Boun
<a href="#">Feb News Penguin Day Subject Line #2</a>	Freeform	Feb 29, 2012 1:52PM	829	16%	10%	
<a href="#">Feb News Penguin Day Subject Line #1</a>	Freeform	Feb 29, 2012 1:50PM	831	18%	8%	
<a href="#">Pre Dashboard March 1 training email</a>	Freeform	Feb 29, 2012 9:25AM	21	48%	24%	
<a href="#">SFNTC Pub Matrix post email 022312</a>	Freeform	Feb 28, 2012 2:46PM	5	60%	140%	2
<a href="#">SFNTC 020112 Analytics Post Training</a>	Freeform	Feb 07, 2012 11:31AM	16	69%	88%	

[View All Sent Emails](#)

## Emails

Name	Type	Last Modified
<a href="#">Feb news Copy HTML Capture- OK TO DELETE</a>	Freeform	Mar 05, 2012 12:23PM
<a href="#">Feb News Penguin Day Subject Line #2</a>	Freeform	Feb 29, 2012 10:36AM
<a href="#">Aspiration expands to South Bay NEW</a>	Freeform	Feb 13, 2012 10:26AM
<a href="#">Copy of Jan 2012 Google Training Announc</a>	Freeform	Feb 11, 2012 2:53PM
<a href="#">Copy of Google Tech Teach-In RSVP blast</a>	Freeform	Feb 11, 2012 2:51PM

[View All Emails](#)




Dear Matt,

I've been working on issues of police accountability, locked-up youth, violence, and community investment for a long time. Sometimes I think that no example of injustice could still surprise me. I was recently proved wrong by the Corrections Corporation of America (CCA).

The CCA recently invited cash-strapped states to sell them their prisons. Part of their offer was a 20-year management contract, plus an assurance that the prison would remain **at least 90 percent full**. Join me in saying: [Shame on you CCA, shame on you!](#)

Incarceration for profit is just plain wrong. Making a business from other people's suffering is wrong. And demanding that states guarantee their for-profit corporation chock full prisons is immoral. It's clear that private lock-ups have zero incentive to end the revolving door of incarceration as long as they can reap millions in profit from overcrowded cells.

Our country needs to invest in businesses and industries that, in turn, invest in our people, create real jobs and help to build a future we can be proud of. [Join me in calling on CCA to immediately rescind its 90% clause from any future contracts with states](#). And to publicly agree that their future contracts and bids will not include **occupancy clauses**. Let's not allow the CCA to put their profits ahead of the health and well-being of our people and communities any longer.

Ever forward,

Jakada Imani  
Ella Baker Center for Human Rights

PS: [Read more about the CCA's offer and our critique of prisons based on a profit motive.](#)

Ella Baker Center for Human Rights  
[www.ellabakercenter.org](http://www.ellabakercenter.org) | 510.428.3939  
1970 Broadway, Suite 450 | Oakland, CA | 94612

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### Stop Corrections Corporation of American

Tell CCA to immediately to remove any requirement to keep prisons full.



**TAKE ACTION**

[Take Action Now](#)

# Advocacy

- ▶ Create action online among your constituents
  - ▶ Petition Builders
    - Allows you to create petitions then either embed, send out a link or email it to constituents
  - ▶ “Contact Your Legislator” Tools
    - Matches constituents with their proper legislator automatically
- ▶ Common Examples:
  - ▶ SignOn
  - ▶ Votizen
  - ▶ Change.org

# Advocacy

## Blue Cross Blue Shield: Henry Young Needs Rehab to Live

➔
**SIGN THIS PETITION**

First Name

Last Name

Email

Address

City

State Select  
[Outside U.S.](#)

Zip Code

Why are you signing? [Add a reason \(optional\)](#)

SIGN

Display my signature publicly

By signing, you accept Change.org's [terms of service](#)



Signatures

**171,145** out of 200,000

Petitioning

VP of Claims Management, Blue Cross Blue Shield Massachusetts  
 (+ 2 others)



Created By  
**Jason Warren**  
 Washington, DC

About this Petition

Petition Letter

Petition Updates

### Why This Is Important

In October of 2011, my father Henry Young -- a 62-year-old husband and father of three who was employed with Philips Medical System in Andover, MA -- had a heart attack while in the gym at work. His heart stopped ten times, leaving his brain deprived of oxygen. After being comatose for several weeks, he miraculously awoke one day and began making great strides towards recovery. Currently undergoing rehab at Whittier Rehabilitation Hospital, he has made enough progress to convince his medical team, family, and friends that with continued rehab he will regain functional motor and cognitive skills.

Despite the critical progress my Dad has made in recent weeks, his insurance provider **Blue Cross Blue Shield will cease coverage of my father's rehab this coming Monday, March 5, 2012.** If this happens,

[Help / Feedback](#) • [Press Inquiries](#)

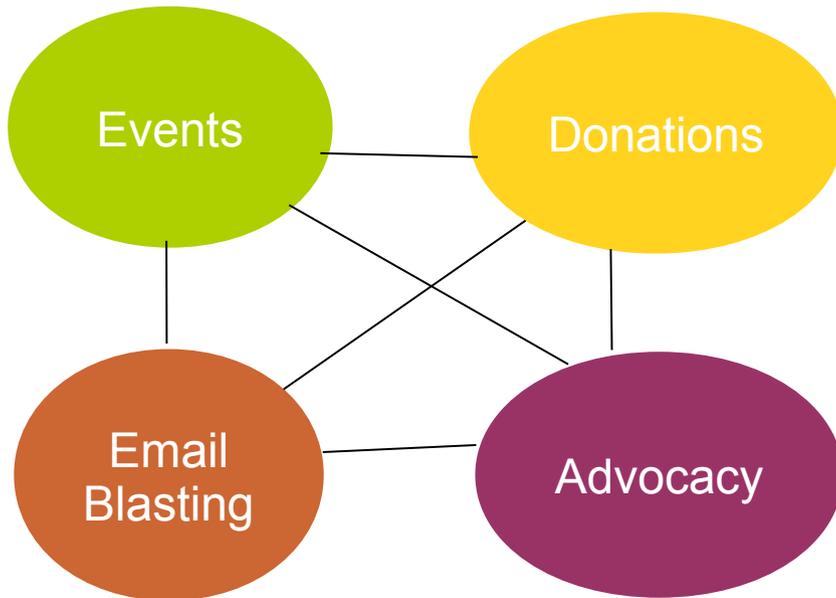
# Contacts

- ▶ Organize and manage organizational contacts
  - ▶ Constituent Relationship Manager (CRM)
    - Centralized Contact Database
    - Can attach information to contacts (e.g. event attendance, money donated, emails opened, etc.)
- ▶ Common examples:
  - ▶ Salesforce
  - ▶ CiviCRM
  - ▶ Convio (Blackbaud)



# Contacts

## Federated System



## CRM





# CRMs

**Biggest Open Deals**

Opportunity Name	Sum of Amount
Green Dot Media - 456K	SGD 456K
Towson Inc - 360K	SGD 360K
Morson Brothers - 320K	SGD 320K
Allied Technologies - 150K	SGD 300K
Southern Research Co - 219K	SGD 219K

**My Quota This Quarter**

Sum of Amount in SGD (Millions): 2.47

**Sales Pipeline by Stage**

Stage	Sum of Amount in SGD (Thousands)	Percentage
Prospecting	168.00	22%
Qualification	308.00	19%
1st Session Makers	705.00	29%
Proposal/Quote	175.00	7%
Closed Won	163.00	22%

**My Tasks**

Complete	Date	Subject	Name	Related To
X	8/18/2010	Meeting	Thomas Green	Green Dot Media - 456K
X	8/18/2010	Send updated pricing	Jeff Ray	Towson Inc
X	8/22/2010	Meeting	Andrew Bowden	Green Dot Media - 456K
X	8/21/2010	Conf Call	Andrew Bowden	Green Dot Media - 456K
X	8/22/2010	Send sales quote	Adison Yates	Morson Brothers - 320K



**Activities**

Filter by Activity Type

Show 25 entries

Rodzaj	Temat	Dodane przez	Z	Przypisany	Data	Stan
No matches found.						

Showing 0 to 0 of 0 entries

**Event Income Report (Summary)**

Event Summary

**Donor Report (Summary)**

Monthly Contribution Summary

Month	Amount (PLN)
Jul 2009	~700
Oct 2009	~200
Dec 2009	~200
Mar 2010	~100
Apr 2010	~1100

**Membership Report (Summary)**

Month Beginning	Membership Type	Member Count	Total Payments Made
styczeń 2011	Student	1	zł 0.00
	SubTotal	1	zł 0.00
luty 2011	Student	5	zł 0.00
	SubTotal	5	zł 0.00
	Subtotal	6	zł 0.00
luty 2012	General	10	zł 0.00
luty 2012	Student	11	zł 0.00
luty 2012	Lifetime	2	zł 0.00

**Top Donors Report**

**Donation History**

Sum of Amount (Thousands): \$300.00, \$200.00, \$100.00

**Campaign Status**

Sum of Amount: \$114.84, \$252.00, \$251.95

**LYBUNT Donors to Contact**

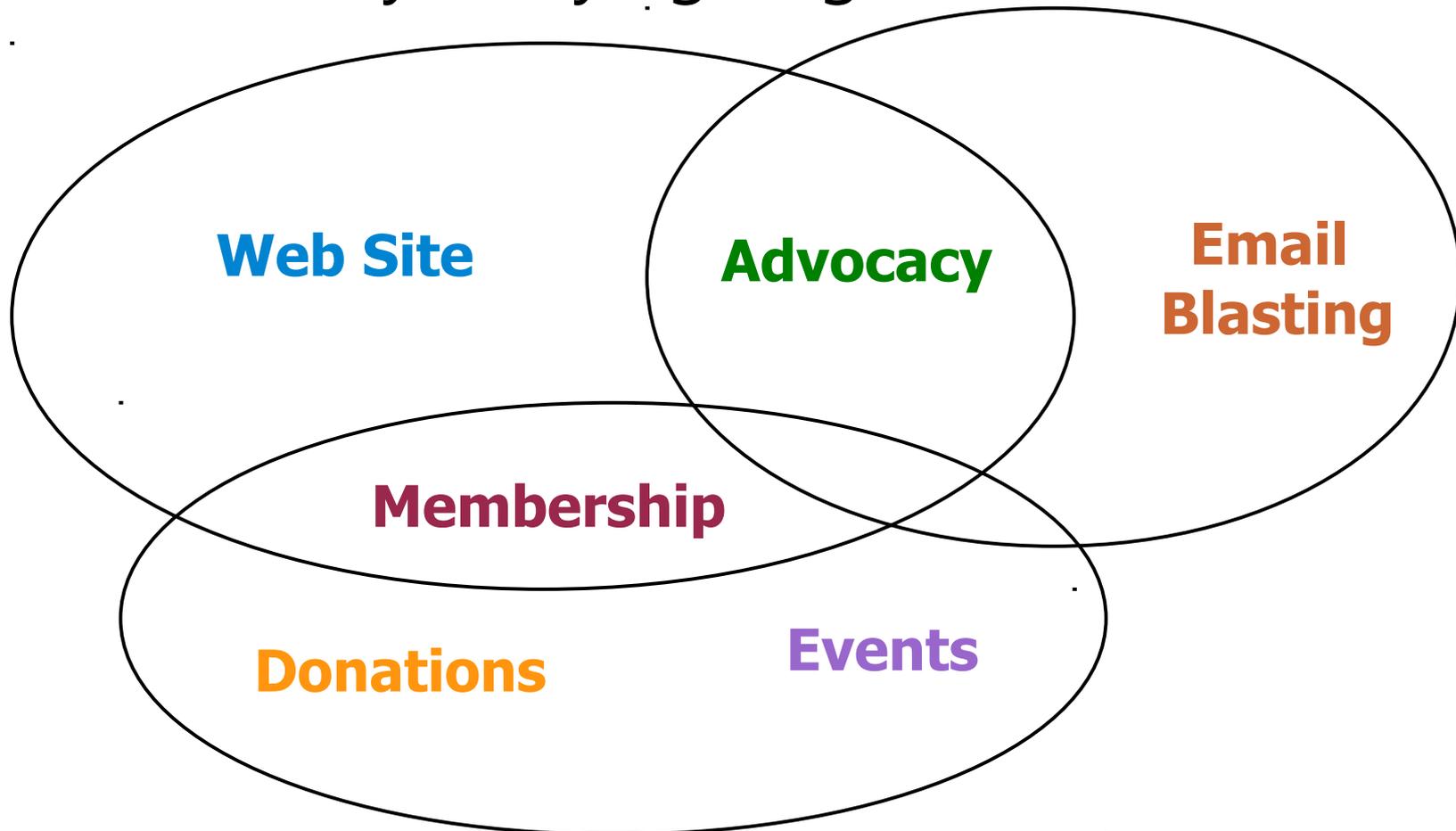
Account Name	Last Year Han
Joe Smith Household	
Victoria Miller Household	

# Multi-Function Tools

- ▶ Combine functionalities from the previous tools
  - ▶ Multi-Function tools
    - Have a wide variety of function combinations (e.g. email blasting, advocacy, web site management, events, etc.)
- ▶ Many times their focus is around your contacts
  - ▶ Many integrated tools act as CRMs
- ▶ Common Examples:
  - ▶ Salsa from Democracy in Action
  - ▶ Nation Builder
  - ▶ eTapestry
  - ▶ Wild Apricot

# Multi-Function Tools

- ▶ Different tools combine different functions
  - ▶ What are you trying to get done?



# Project Management

- ▶ Share and manage project (or organizational) assets
  - ▶ Project Management Tools
    - Share docs, calendars, tasks and files
    - Have multiple online users
  - ▶ Shared server
    - Share docs, files on a local network
- ▶ Common Examples:
  - ▶ Basecamp
  - ▶ Red Mine
  - ▶ Shared server

## Tip:

This is the place to share org processes and documents (e.g. Publishing Matrix, Traffic Doc)

# Project Management

Matt Garcia
Aspiration 3.0

Dashboard
To-Dos
Calendar
All People Search

**Latest activity across your projects**

[Review 18 overdue milestones](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
4	5	Today 6	7	8	9	10
11	12	13 • VISTA Call 7pm	14	15	16	17

engage SBV - Jessica S.  
 engage SBV - Uno N.

[View the full calendar](#)

**Aspiration — Aspiration Team**

To-do	work on newsletter template <a href="#">Jessica 030512</a>	Completed by Jessica S. Yesterday
To-do	Send Gunner Off-Site To-Dos AND Buckets of work <a href="#">Matt 030512</a>	Assigned to Matt G. Yesterday
To-do	get new computer <a href="#">Jessica 030512</a>	Assigned to Anyone Yesterday
To-do	scc blog post about getting ride of online idenity <a href="#">Jessica 030512</a>	Assigned to Anyone Yesterday
To-do	Thursday: Block out for Fun Work Day with Staff <a href="#">Misty 030512</a>	Assigned to Anyone Yesterday

**Aspiration — TCE 2012**

File	<a href="#">AspirationTCE2012Budget030512.ods</a>	Uploaded by Misty A. Yesterday
File	<a href="#">AspirationTCE2011Budget030512.ods</a>	Uploaded by Misty A. Yesterday



+ Create a new project

**Oops, you're out of projects!**  
Ask your account owner to upgrade this account to create additional projects. It only takes 10 seconds.

**Your projects**

**Aspiration**

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- [Web Site](#)

# Social Media

## ▶ Converse with your community

### ▶ Blogs

- Longer-form writing allowing conversation through comments
- Now blog features are integrated into most CMSs

### ▶ Social Networks

- Shorter-form content sharing
- Various network-specific functions for interaction

## ▶ Common Examples:

- ▶ Wordpress
- ▶ Twitter
- ▶ Facebook

Tip:

Only bite off as much as you can chew.

# Social Media

**Aspiration's Social Media Dashboard**

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 **aspirationtech:** RT @NewMediaRights: New video competition on why Open Education matters <http://t.co/K1fh6dqb> #Creativecommons @OpenSociety - about 20 hours ago

 **cStreet\_ca:** RT @DigitalLeapCda: "Building a Social Media Dashboard Training Materials" /via @aspirationtech <http://t.co/BZtW9w6l> #npotech - 3 days ago

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 **aspirationtech:** RT @cozimek: This setup looks familiar, right @aspirationtech? Circles beat theater seating for collaborative events. #joomladaygt <http://t.co/OOmTMkcN> - 4 days ago

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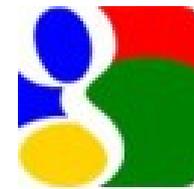
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# Caveats of Online Tools

- ▶ Can take a lot of time
  - ▶ Time = Money
- ▶ Big corporations who want your data
  - ▶ You are the product
- ▶ There are billion of tools
  - ▶ Which ones do we need?
- ▶ Tools change **EVERY. SINGLE. DAY.**
  - ▶ How can we keep up?



# Limitations of Online Organizing

- ▶ Digital divides
- ▶ Never forget who is left out by "e" strategies
- ▶ Trust relationships are best built in person
- ▶ Online organizing is most effective when it leverages established social networks and communities
- ▶ Each community and campaign is different
- ▶ Your mileage will vary

# Bottom Line

- ▶ Online tools aren't a magic bullet
- ▶ You need:
  - ▶ An measurable goal
  - ▶ A compelling message
  - ▶ Effective tactics to realize your goal
  - ▶ A plan for engaging supporters and well-defined ways for them to plug in
- ▶ eAdvocacy is more about organizing and organizational challenges than tech challenges

# 4 Processes for Sustainability

- ▶ Audience Assessment
  - ▶ Do you really know who you're talking to?
- ▶ Publishing Matrix
  - ▶ Do you have a model for when to use what tool?
- ▶ Message Calendaring
  - ▶ Is all online messaging on a unified calendar?
- ▶ Tracking & Metrics
  - ▶ Which techniques are working?

# In Summary

- ▶ Remember that tech should support your work as an organization
- ▶ Tools should support your tech strategy goals
- ▶ Think about the minimum to be successful and then iterate up
- ▶ Tools come and go, succeed and fail. Focus on your data rather than the tool

# Next Steps

- ▶ Define your organizational goals
- ▶ Think about what tools will help you achieve your goals
- ▶ Start tracking your measurable comms goals

# Thank You!

- ▶ Questions?
- ▶ Comments?



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