

EDITORS

Holly Ross    Katrin Verclas    Alison Levine

# Managing Technology to Meet Your Mission

*A Strategic Guide*

FOR **NONPROFIT** LEADERS



People Who Change the World Need the **TOOLS** to Do It



# **Managing Technology to Meet Your Mission**

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# Managing Technology to Meet Your Mission

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A Strategic Guide  
for Nonprofit Leaders

HOLLY ROSS, KATRIN VERCLAS, ALISON LEVINE  
EDITORS

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People Who Change the World Need the Tools to Do It  
Sponsored by NTEN: The Nonprofit Technology Network



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# ACKNOWLEDGMENTS

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NTEN is a community of nonprofit technology professionals, and tight-knit communities are like families. Mostly, we support each other, we listen to each other, and we bring out the best in each other. We're better collectively than we are on our own. We also have our differences, but it's those differences, and the spaces we create to share them, that make us better.

We'd like to think that this book is a reflection of our community. Not only are all the chapter contributors NTEN members from a wide variety of backgrounds, but the book itself was born from the NTEN community. It was your queries on our discussion lists, your comments on our blog, and your hallway conversations at our annual conference that inspired us to attempt to tackle these topics. Many of our members provided feedback and ideas as we worked our way through the manuscript, and we thank you for sharing your experiences and expertise.

Along the way, numerous people helped make this book a reality. First, thank you to Alison Levine. You tackled the editing of several key chapters, provided invaluable advice on the rest, were a sounding board whenever we needed to vent. You are talented and thoughtful—a real treasure. We were very lucky to work with you.

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## THE EDITORS

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**Holly Ross** has spent more than five years at NTEN, combing through all the technology fads and listening to the NTEN community to line up the webinars, conferences, and research that will help members use technology to make the world a better place. From ubiquitous access to technology leadership to social media trends, as executive director, She brings the wisdom of the NTEN crowd to the nonprofit sector.

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She is the author of a chapter in *Mobilizing 2.0*, a book focused on engaging young people in public life. She is a frequent speaker on communications and ICTs in civil society at national and international conferences and has published numerous articles on technology for social change in leading popular and industry publications.

**Alison Levine** has worked in the nonprofit sector for more than ten years, the last two as NTEN's Special Projects Fellow. She holds master's degrees in nonprofit administration and in science and environmental reporting. She whole-heartedly believes that technology is the most powerful tool to help nonprofits change the world. When she is not thinking about technology and nonprofits, she likes to go to the other end of the technological spectrum and get out into the wilderness where her cell phone doesn't even get reception.

# INTRODUCTION

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As a nonprofit leader or manager, you probably play a number of roles: human resource manager, chief financial officer, keeper of the mission, wrangler of the board, and on occasion maybe even cleaning staff. There's one more role you need to play, even though you may not have realized that when you signed up for the job: the role of technology manager.

There is not much in your nonprofit that isn't profoundly affected by technology. From financial management to program delivery to fundraising, technology is fueling the efficiency, effectiveness, and innovations in your organization and around the sector. Nonprofit organizations are using databases to track donations, email programs to reach members with their messages, and accounting software to manage their finances. Increasingly, nonprofits are using the Web to deliver services to their clients, bringing laptops out into the field with them, and experimenting with social media like Facebook and blogging.

Yet even as technology is changing the way we live and work, many nonprofit leaders are struggling to understand how to effectively manage the technology they have and how to position themselves to leverage technology in their future work. And yes, technology in its many forms can often seem like an unruly child: full of possibilities, but sometimes tough to manage. If you are one of those leaders struggling to make sense of all this, we're here with three important messages:

It's not your fault.

You are not alone.

You can do it.

Let's start at the top: *it's not your fault*. In our conversations with nonprofit leaders around the world, we often hear about the same challenges:

- *The rate of change is accelerating.* It often feels like your technology is out of date before you get it out of the box. Get used to the feeling, because it's not going away any time soon. In fact, social scientists are throwing away their old models for predicting the rates of technology change. Some now estimate that the amount of change in the twenty-first century will be equivalent to all the change in the previous twenty thousand years.<sup>1</sup> That's a lot of change.
- *Language is a barrier.* Like medicine and law, the language of technology is littered with acronyms and secret meanings. RAM, ROM, and CPU are the tip of the iceberg. For the uninitiated, technology is the domain better left to experts who can navigate the zeroes and ones that make it all go. And let's be honest: working with experts isn't always easy.
- *Choosing what advances your mission is hard.* Whether you are investing time or money (and usually it's both), you are expending precious resources to get that new database up and running, redesign your website, or update your computers. Given that technology is not your core expertise and that it changes all the time, understanding how technology investments advance your organization's mission is hard.
- *Failure is scary.* You're a leader because you're successful, right? No leader wants to fail, and unless you are really comfortable with it, technology is probably one area where you will fail. Maybe more than once.
- *Managing change is not easy.* As you will see in this book, technology isn't really about technology at all; it's about change. The introduction of even the smallest technology at your organization will change how and why people do their work. And that is harder to manage than anything.

If any of those challenges sound familiar, then this book is for you. *Managing Technology to Meet Your Mission* is more than just a technology primer. It will give you the information you need to know to understand the key technologies in your nonprofit. And more important, we give you the strategies you need to manage those technologies. Because each nonprofit is unique, how and why you use technology to meet your mission will vary. You will not find hard and absolute rules here, but you will find models for making technology decisions and guiding your technology strategy. We cover a wide variety of topics in the book, from budgeting for IT to online fundraising, but there are a few key themes that appear in nearly every chapter:

- *Mission first.* As a nonprofit leader, you may find that your staff, board, and stakeholders pitch new technology ideas frequently. Well-meaning individuals sometimes develop what we like to call “shiny object syndrome.” They see a new tool and are mesmerized. It may even happen to *you* from time to time. The first step in making good technology decisions at your organization is to understand which technologies matter for your mission and which don’t. This will eliminate 90 percent of the technology clutter you deal with. No matter what aspect of the organization’s use of technology you are addressing, you have to ask yourself first, “Will this help us meet our mission better?” If the answer is no, move on. If the answer is yes, you have some more investigative work to do.
- *People second.* Technology is always about more than the actual application or tool. If a technology is truly going to help you meet your mission, your staff, board, and stakeholders need to see that value and buy into inevitable changes. Recognizing and validating the human experiences in your organization is an essential ingredient to success. The “people” part of technology also means making sure that you have the right people providing your technology support and services.
- *Evaluate and iterate.* Regardless of size or scope, every technology undertaking should be evaluated. More than ever before, technology affords you the opportunity to measure. Although you won’t want to measure everything, you should measure the impact your technologies have on your organization in time saved, money saved, new

stakeholders reached, dollars raised, and, most important, meeting your mission. If your technology implementations don't advance your goals, you'll need to rethink and iterate.

This brings us to our second message: *you are not alone*. Nonprofit leaders and even the people who wrote this book encounter these challenges every day. They surface in almost every training and in the many mailing lists that NTEN runs. This is why we've created this book. We hear about these from leaders at tiny volunteer-run start-ups and at giant international organizations. We want you to know that what you're experiencing is par for the course, and that with some training and some resources you can indeed become an extraordinary leader in regard to technology.

The contributors to this book reflect the scope and diversity of the IT experience. Consultants, IT directors, and even a governor contributed chapters to this book, and each of them struggled with the issues they address before they became subject matter experts. What they'll all agree to is this: successfully managing technology is about 10 percent technology and 90 percent planning and people.

Accordingly, you'll find two parts in this book: Part One, "Planning and People," and Part Two, "The Tools."

## Planning and People

Part One addresses the softer side of technology—the things that aren't about technology specifically, but can make or break your effort. The chapters in this section address topics such as planning, staffing, and budgeting:

- *Mission First: Achieving IT Alignment*. The relationship between technology and mission isn't always clear-cut, but it's the most important part of managing technology in any organization. In this chapter, we help you understand how technology and mission relate and give you a step-by-step process for aligning technology with your mission.



- *Managing Technology Change.* Most nonprofit leaders will tell you that money and time are the two biggest barriers to technology adoption. But all the money and time in the world won't guarantee the success of a technology initiative. To introduce technology in your organization successfully, you'll need to foster the right culture in your organization. In this chapter, we discuss the finer points of learning and inclusiveness that can make or break any technology initiative.
- *Measuring the Return on Investment of Technology.* Assessing the return on investment (ROI) of technology projects is crucial to securing board support and staff buy-in. This chapter explains techniques for ROI analysis in the nonprofit context to help guide your decision making and demonstrate results.
- *How to Decide: IT Planning and Prioritizing.* Nonprofits have limited resources, which usually means that we have to make tough choices about where to spend our time and money. Here we cover best practices in planning for technology projects, providing tools to help you make smart decisions about where to invest those resources.
- *Finding and Keeping the Right People.* Having the right staff in place is crucial to success with technology. This chapter discusses different specializations within technology, how to write a good job description for IT staff, and how to match skills sets with organizational needs for maximum effect. It also discusses recruiting channels, salaries, and evaluation of applicants' skills in the hiring process.
- *Budgeting for and Funding Technology.* Setting appropriate budgets and securing resources is one of the most important jobs a leader has, and raising money for technology presents a special set of challenges. This chapter examines adequate budgeting for different types of organizations and the classification of technological expenses, including what counts toward overhead versus program expenses. We review strategies for pitching technology projects and explore the foundations that fund them.

## The Tools

Part Two gives you an overview of the common tools you will use to get your work done, communicate, evaluate, and even raise a little money.

- *The Foundation: Introduction to IT and Systems.* Fancy online fundraising strategies and a fantastic website won't matter much if your IT basics aren't working. This chapter introduces the basics of information technology and systems in nonprofits, in simple, easy-to-understand language. IT areas such as databases, websites, and back-office infrastructure are covered. You'll gain a basic understanding of the workings and uses of IT systems and tools, providing a good foundation for the chapters that follow.
- *Where Are Your Stakeholders and What Are They Doing Online?* Before you engage in any online activities, it's a good idea to find out if your audience is online and what they are doing while there. We take you through some easy to implement evaluation strategies for determining what your audience is doing online now and for evaluating your online endeavors later.
- *Effective Online Communications.* The Internet has revolutionized marketing as a field. The creation of websites, campaigns to drive traffic to those sites, email newsletters, and blogs are just a few ways that marketing has advanced. This chapter provides strategies, best practices, evaluation, and case studies about online marketing to familiarize you with the breadth of possibilities and inform your decisions about allocating your marketing budget and staff time.
- *Donate Now: Online Fundraising.* Anyone with a "Donate Now" button can tell you that online fundraising just isn't that easy. Successful online fundraising strategies take planning, flexibility, and creativity. In this chapter, we outline the basics of a successful campaign, providing case studies and benchmarks to facilitate realistic goal setting.
- *Where Will We Be Tomorrow? The Future of IT in Nonprofits.* No one can tell you exactly what technologies and tools will crop up in the com-

ing years, but we can talk about the trends that are most likely to continue and how that will affect your organization. This chapter offers practical advice to guide your current decision making and ensure that the choices you make now will matter in the coming years.

Don't think you need to sit down right now and read this book straight through to get the most out of it. As executive directors and managers, we know that nonprofit leaders don't always have the kind of time that book reading requires. Instead, we designed the book with your typical questions (and occasional crises) in mind. If, for example, you've just installed a new database, the staff hates it, and you want to quell the mutiny before it begins, you should skip straight to Chapter Two, "Managing Technology Change." If your boss wants to you spice up your e-newsletter, head over to Chapter Nine, "Effective Online Communications." However, if you find yourself facing a whole set of technology issues and you're looking for support in developing a larger technology strategy for your organization, then the entire book will provide a nice framework for you.

We've tried to cover the most important aspects of technology management, regardless of the size or issue area of your nonprofit. As comprehensive as it is, it doesn't cover every piece of technology used by nonprofits, and it's not a how-to manual for any specific set of tools. Use this book to shape your technology strategy—that is, how you make technology decisions—not for advice about which tools or services to use.

We wrote this book to get you started on the path to expertise. We also know that you will need support along the way. Some days you will need advice; others, a place to vent. It's important that you find a community of peers that will support you on your journey. The NTEN community is designed to provide that kind of support: answering technical questions, reviewing vendors, providing new ideas, and providing you with the support and wisdom along the way. In fact, we've set up a special site for readers of this book where you can get more information from the authors and additional information we weren't able to include in the book, as well as discuss your organization and the book. Join us at <http://meetyourmission.org>.

Here's our third and final message for you: *you can do it*. You can lead in the realm of technology as confidently and skillfully as you lead any other part of your organization. You don't need to get special technology training, and you'll never really have to know what XML stands for. Creating real change in your community is hard—and you do it anyway. You make remarkable things happen every day. Leading your organization's use of technology will be easy for you in comparison.

We look forward to working with you!

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## Note

1. <http://www.kurzweilai.net/articles/art0563.html?printable=1>.

# **Managing Technology to Meet Your Mission**

