NONPROFIT ESSENTIALS

Managing Technology

JEANNETTE WOODWARD

WILEY

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To Laura, Chris, Lowell,
and John with much love.

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About the Author

Jeannette Woodward is a founder and principal of the Wind River Nonprofit and Educational Consulting group. She is also a nonprofit board member, volunteer, and battle-scarred veteran of bake sales, wine tastings, and rubber duck races too numerous to mention.

Before becoming involved in the Wind River Nonprofit and Educational Consulting Group, Woodward was a library administrator with many years' experience in public and academic libraries. It was her responsibility to supervise the library's technical staff and plan for the development of a variety of computer systems. She was also instrumental in obtaining grant funds for technology and assisting other libraries and nonprofits to obtain technology resources.

As an active member of many community groups, she realized that nonprofits experience even more computer crises than comparable, for-profit business organizations. Vital projects like fundraising campaigns are not as effective as they should be because of inadequate information. Since a group's mission should guide its use of technology, she decided a book that addressed the unique needs of these organizations was badly needed.

Woodward's books published by the American Library Association, *Creating the Customer-Driven Library* (2004) and *Countdown to a New Library* (2000), include chapters on technology planning and management. She has also written a number of journal articles dealing with technology and is the author of a chapter in the *Annual Review of Information Science and Technology* (American Society for Information Science, 1996). Among her other publications is the college writing textbook *Writing Research Papers: Investigating Resources in Cyberspace* (McGraw-Hill, 1999).

Woodward holds a masters degree in library and information science from Rutgers University with further study in higher educational administration at North Carolina State University. She is the mother of two children: Laura, a social psychologist, and Christopher, an attorney who is presently working on the Pacific island of Saipan.

Contents

Preface

In recent years, successful nonprofit organizations have used computers to become more effective in nearly every way. They have learned how to enhance the productivity of both staff and volunteers, so they can achieve more with limited resources. Because competition for funding dollars has become so aggressive, organizations that have ignored the computer revolution or use computers as expensive typewriters are at a serious disadvantage.

What makes some organizations successful while others flounder, losing membership lists in hard drive crashes or going over budget because of computer-generated errors? The answer is neither more generous funding nor more high-tech expertise. Successful nonprofits have learned to manage technology. That means that computers and software programs have been absorbed so completely into the missions and goals of these organizations that they are inseparable from them. Technology isn't a frill or a toy. It is a tool used by all group members to achieve their shared vision.

Purpose

This book is intended to help nonprofit leaders become not only more effective as administrators, marketers, researchers, and fundraisers, but also more responsible custodians of limited funds. When every penny counts, computers can help to make it possible for small, committed groups to perform the routine tasks that once required a small army to accomplish. Technology in nonprofits is most useful when it frees both human hands and human imagination.

Where once technology costs were so high as to be beyond the reach of all but large organizations, even the smallest nonprofit can now design and implement a basic technology plan. There is no question, however, that technology isn't always a faithful servant. As many groups can attest, failed technology can actually interfere with an organization's effectiveness. Instead of easing the workload of staff and volunteers, freeing their time for more meaningful work, technology becomes a handicap and a source of conflict. This is not usually the result of equipment failure but, like so many other organizational breakdowns, more the result of human failings like the unwillingness to learn, to share information, and to cooperate.

Overview of the Content

Failures happen when technology is someone else's responsibility, when group members view the computer system as some other member's brainchild that exists chiefly to complicate their lives. This tends to occur when technology is imposed from on high. One or more members of the organization become a sort of technical elite and seek to impose their plan on the organization.

Although this book will describe some of the "nuts and bolts" of setting up computer systems, its real emphasis will be on people rather than on machines. It is not intended for computer pros but for people who care deeply about their organizations and will do what it takes to help them succeed. Everyone can use technology effectively no matter what his or her level of technical sophistication. It's great to have computer gurus among our ranks, and we have much to learn from them. However, the real secret to success lies not in high-tech achievements but in incorporating basic computer literacy into the goals of our organizations.

Technology Brings Change

Computers, when used effectively, tend to move an organization toward greater structure, since responsibilities must be formally assigned. Unlike business enterprises, a formal division of labor is difficult for nonprofits that depend heavily on large numbers of volunteers who each contribute a few hours of their time. Effective use of computers depends on developing habits, and this is difficult when so

much time elapses between work periods. This means that written instructions are needed to standardize procedures, another difficult adjustment for organizations accustomed to "flying by the seat of their pants." Routine and uniformity are essential, not because of a power-seeking individual's whim, but because that's the way computers work. Thus, changes in the organization are essential, but they must arise from the common consent of the group, not from the command of an elite group.

Audience

This book is intended for all mission-based organizations. In other words, it may be useful to both staff and volunteers of charitable, faith-based, advocacy, professional, and even government-funded organizations like schools and libraries.

A special need, however, exists for a book that can speak specifically to smaller and midsize nonprofits that may employ few paid staff members and carry out much of their work with volunteer labor. For such organizations, there is a lack of professional literature to guide their forays into technology planning. Policies and practices that work well for businesses with technology departments and full-time staff are often impractical where any computer may be used by a dozen or more volunteers and where no technical support staff is immediately available to deal with crises. This book, therefore, is intended to make the basics of technical planning intelligible and even enjoyable to board members, administrators, and volunteers who have found the subject intimidating in the past. All these organizations depend on a special kind of synergy that enables ordinary people using limited resources to move mountains.

NONPROFIT ESSENTIALS
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CHAPTER 1

Getting Started with Technology

After reading this chapter, you will be able to:

- Decide exactly what it is you want to get from technology.
- Measure both the cost and the rewards of technology.
- Perform a technology assessment.
- Understand the basic components of a technology plan.

The Impact of Computers

In just a few years, computers have become a part of nearly every aspect of modern life. In fact, they have transformed every sector of our society. At first, only larger organizations could afford the high cost of hardware and software. In recent years, however, costs have fallen to the point that most individuals and organizations have some kind of computer access. As time goes on, it becomes increasingly clear that the effective use of technology is one of the most important determinants of success for any organization. It is no longer possible for most public, commercial, or mission-based endeavors to be competitive with inadequate technology planning and implementation.

Learning from the Business World

It is no exaggeration to say that computers have revolutionized the business world. Business organizations have embraced computers because they can readily see technology's impact on that universal measure of success, the bottom line. Unlike nonprofit organizations, businesses routinely measure both cost and profit. The impact of automation can, therefore, be calculated in dollars and cents, allowing any business to know precisely what technology is worth. Hard-pressed nonprofits have no such clear measure to guide their planning.

By definition, nonprofits are unable to use profitability as a measure of success. In addition, they find it more difficult to measure cost than do business enterprises. Cost, as calculated by nonprofits, involves not only the expenditure of funds but also the use of other resources. How, for example, does one calculate the cost of volunteer labor? Even though no paycheck is involved, it must be considered a cost. If those volunteer hours were not needed to perform a given task, they might be devoted to some other project. That means that if technology can reduce the number of volunteer hours needed to perform routine tasks and free individuals to perform other duties, the result is increased productivity. Although nonprofit productivity can be compared to profitability in the business world, this is rarely done.

In order for nonprofit organizations to make effective use of technology, they must develop methods for evaluating costs and benefits. To do so, it is necessary to focus on both the investment of the organization's resources and the projected returns on those investments. Before embarking on a technology program, nonprofits must decide exactly what it is they want computers to do for them (the return they expect on their investment). Where can the biggest gains be realized with the smallest outlay of resources? Which functions and projects lend themselves most readily to automation and do not place unrealistic demands on staff and volunteers?

Planning for Technology

In many nonprofit organizations, technology enters the picture almost by accident. A used computer is offered and accepted. It often happens that a newly formed nonprofit is initially grateful for almost any donation. Group members may find it

convenient to donate their old computers when they purchase new ones for their personal use. Before anyone is aware of what's happening, the organization is loaded down with piles of equipment that no one quite knows what to do with.

About the time that the second computer is offered, give some careful thought to the role of computers in your organization. A technology plan is the first essential step and should be hammered out before your organization begins accumulating equipment or investing in a computer system. What does your group really plan to do with computers in the near future? A generation of technology has a very short life. Computers purchased today are obsolete in three years, so vague long-term plans are not useful at this point. What can computerization do for your organization now? Next week? Six months from now? Of course, planning must extend further into the future but emphasis should be on the concrete.

Assigning Responsibility for Technology

The key to a successful technology program is the involvement of a diverse group of talented people. Technology should never be the responsibility of one individual, and effective planning requires buy-in by both decision makers and the general membership. A technology team should be selected soon after the first computer arrives. This should be a small group of possibly four or five computer-literate group members. If possible, it should consist of a board member, an administrator, and representatives of different committees, departments, or other groups within the organization.

At least one of the members of the "tech team" should meet the definition of "technology advocate." Technology advocates possess a level of computer sophistication that is beyond what would normally be considered basic computer literacy. They may or may not be computer professionals but they have enough experience to provide leadership in making computer-related decisions. Other members of the team can represent the board, staff, committees, and volunteer groups. Together, they possess a clear understanding of the needs of the organization and occupy respected leadership roles.

Technology Planning Takes Time

Although most of the members of the tech team need not be highly skilled computer users, it is important that members understand that this will be a demanding job and will require real commitment. As time goes on, their work may become less intensive, but in the beginning they must be prepared to work closely together, meeting weekly or even more frequently. In addition, they should be prepared to spend time researching technology issues and consulting colleagues in other organizations. It is they who will be guiding their organization's technical development and doing much of the planning.

Each tech team member should have clearly defined responsibilities both to the tech team and to the group he or she represents. In a sense, belonging to the tech team is an educational experience. At each meeting members share their research or question invited guests about their technology options. Even though members may begin with average computer skills, they soon acquire the information needed to make important technology-related decisions. This means that members who frequently miss meetings will not acquire this knowledge base and will not be prepared to participate in the decision-making process. For this reason, many tech teams limit the number of meetings their members can miss without forfeiting membership.

Performing a Technology Assessment

Before a group can create such a plan, however, they must assess the resources that are already available. What funding, equipment, and expertise can be counted on? What resources could be made available with a little effort? Your initial response may be that you have no resources. While it is true that a new or very small organization probably has a small budget and very little equipment, those are not the only considerations. Every nonprofit has access to a combination of human and material resources. Which of these could be contributed to an automation project? Here are some questions to get you started:

- What is your organization's annual budget? How much money can be set aside annually to purchase and maintain a computer system?
- Does the organization employ paid staff members? Could any staff time be made available for computer maintenance and other computer-related activities?
- Do you have any volunteers who possess special computer skills?
- How would you describe the average computer skill level of your group members?
- What proportion of your staff and volunteers use computers on a daily basis (either their own, their employer's, or the nonprofit's)?
- Do you have at least a few group members who have the skills to install computer equipment and perform simple maintenance functions?
- If the answer to the last question is a resounding "No," would you say that your group is going to need a lot of preparation or training to use computers effectively?
- How many computers does your organization now own?
- How old is each of the computers?
- Are the computers linked to one another in a network?
- Are you able to access the Internet? If so, must computers use the same dial-up phone line used by telephones, do they have their own phone line, or do they connect to the Internet via a high-speed data line?

In addition to answering these general questions, it is a good idea to create an inventory of both hardware and software currently owned by your organization (see Exhibit 1.1). The TechSoup website (www.techsoup.org) offers a word-processor-based software assessment worksheet, but it is easy to create your own.

LEARN MORE ABOUT

Technology Assessments

- Discover Npower, which provides technology assessment and planning tools, at www.npower.org.
- Consider using the Nonprofit Organizational Assessment Tool available at www.uwex.edu/li/learner/assessment.htm.
- Find a variety of useful articles at TechSoup, a great resource for nonprofits at www.TechSoup.org.

Focusing on Individuals

Once you have answered these questions and completed the inventory, you have the basis of your "technology assessment." This summary of your resources will become your guide for future planning. Pay special attention to the abilities and interests of your group members. Many nonprofit administrators contend that this is the single most important determinant of a successful technology program. It may be a good idea to survey group members to learn about their computer skills and interests.

Each nonprofit organization tends to attract its own unique group of supporters, but there are some generalizations that can be made. People who are still in the workforce usually have access both to computers and computer training. The older the individuals, the less likely it is that they have enjoyed these advantages. Some administrators mistakenly assume that older retirees are unable to learn to use computers. In reality, most senior volunteers enjoy learning new things and can become proficient computer users if they are fully trained. Such training, however, is a commitment involving the expenditure of some of the organization's resources. Although the costs of creating a computer-literate staff and volunteer corps are high, training is the key component that will largely determine the success of all future automation projects.

EXHIBIT 1.1

Taking a Hardware and Software Inventory

Carefully examine each computer. On your equipment inventory worksheet list:

- Brand
- Model
- Serial number
- Monitor type
- Processor type and speed
- RAM (random access memory)
- Hard disk capacity
- Available hard disk space
- Other drives (CD, DVD, floppy)
- Operating system
- Modem or network card (if any)
- USB ports
- Other equipment, including printers, switches, and scanners

On your inventory worksheet list the major software packages owned, include:

- Program title
- Version number
- Number of computers on which software can legally be installed
- Number of simultaneous users legally permitted to use the software