The Rhode Island Foundation
ONE UNION STATION   PROVIDENCE RI   02903   (401) 274-4564

Aligning Strategic Thinking and Technology

a workshop presented by

The Initiative for Nonprofit Excellence

a program of

The Rhode Island Foundation

Goal for this session: To introduce you to some strategies for using information and communication technologies to support your nonprofit organization's mission, to provide some very practical tips for getting started, and to point you to some first-rate free or low-cost resources.

Recommended for: Nonprofit managers who have little or no background in information and communication technology.

Session facilitator: Deborah Elizabeth Finn, Cyber-Yenta

Ten Things (Just Ten!) That Every Nonprofit Executive Needs to Know About Information Technology

1. Very little technical knowledge is required in order for nonprofit CEOs to participate actively in strategic IT planning.

As long as you thoroughly understand your organization's overall mission, strategy, and tactics and (are willing to learn a little bit about the technology), you can keep

your information technology infrastructure on target.

Example: Your mission is to save the whales (not to maintain a web site)! In order to save the whales, you need a strategy: to stay informed and inform others about the issues, lobby for policy changes, to issue action alerts, to raise money, and to maintain relationships with various legislators, constituents, communities, donors, potential friends, and allies. Keep pressing for tactics that will help you achieve your desired outcomes (saving whales); this will enable you to hold your own in most discussions with technical experts.

2. **Your board of directors should be calling for and participating in your strategic information technology planning.**

If they're not, it's time to recruit some board members who are techies. For example, your region probably has an internet service provider, a high-tech corporation, or a large retail firm with an extensive IT department. Perhaps you can recruit representatives from these organizations to serve on your board as part of their community benefits program.

3. **A tremendous number of high-quality resources for strategic IT planning are available to nonprofits at no charge.**

Many of the best free tools services are available as web services, and don't require you to make an investment up front in hardware or software.

Free advice, products, and services make it possible for nonprofits to lower the risk of trying new technology - but in the long run you'll have to pay real money to have precisely the right tools for supporting your mission.

4. **You can keep an eye on innovations in IT, and think about possible uses for them in the nonprofit sector, even if you don't have a technical background.**

If you regularly read the technology columns of a good daily newspaper, and a few general interest magazines such as "PC Monthly," "MAC User," or "Network World," you will soon catch on to the basic concepts and terminology. (Don't worry if it seems over your head at first - you'll catch on! Everybody has to start somewhere.)

Example: You work for a nonprofit organization with five employees and four non-

networked computers. It's time to link them up so that you and your colleagues can share information and regularly back up your work. As you read articles on wireless networking, and look at the building where you work - which is a pre-electricity Victorian house only somewhat successfully retrofitted for its current functions - you see that you may actually save money by going wireless. You ask your IT vendors for estimates on drilling and running cables through the building, and to investigate wireless network security to maintain the confidentiality of your files. You find that the cost of labor, support, upgrades, future expansion, and maintenance for a more conventional network will exceed that of a simple wireless network.

5. Information technology, no matter how strategically you apply it, will probably never save your nonprofit organization any money.

It will, however, enable you to work more effectively. You will probably be able to do more work, of higher quality, with fewer person-hours. But don't be surprised if this raises the bar of expectations on the part of the board, the community, the clients, the constituents, and the donors!

6. You need an in-house IT committee.

Convene an Information Technology team or working group, within your nonprofit, and make sure that you meet regularly to give input to the senior management on strategic IT issues. The team should include a cross-section of staff - administration and finance, programmatic, secretarial. Be sure to include staff members who are overtly or covertly technophobic; their concerns should be addressed.

7. Secretaries and administrative assistants should be the linchpins of your IT infrastructure.

Budgeting for IT training for these employees can be one of your best investments.

Which staff members are more likely to be there when problems arise, to know about the technical abilities (and phobias) of their colleagues, and to be know where the (paper or electronic) files are? Professional development that includes IT training is likely to increase job satisfaction and employee retention. Don't forget to revise job descriptions and job titles as your secretaries and administrative assistants move into IT management responsibilities!

8. In the long run, IT training and support can account for more than 70% of your IT budget. The more obvious line items - such as hardware, software, and network services — will probably add up to less than 30%.

This is a highly counter-intuitive fact of nonprofit life. The more concrete, visible IT assets are not the biggest budget items. Moreover, the cost of downtime for staff members who cannot work because obsolete equipment has crashed is high in many nonprofits. In addition, the cost of good training for staff members is considerable, and yet the cost of wasted staff time due to lack of training is higher.

9. Donated hardware, software, and services can cost a nonprofit more than purchased products or services in the long run.

The cost in person hours of using and maintaining non-standard or sub-standard configurations is astonishingly high, and donated equipment tends to be in non-standard or sub-standard. Likewise, donated services will cost you a great deal of time in support, supervision, and ongoing maintenance. Beware of the web site design services donated by a close relative of the chair of your board! You may end up with something that you don't like, can't use, or can't easily change.

10. In a nonprofit organization, most strategic IT problems are actually organizational development **problems.**

Is it a CEO who is resistant to technical innovations? A board of directors that hesitates to make the commitment to raise the money need for the IT infrastructure? Line staff who are already stressed and overworked, and can't stop to learn and implement new technologies? An inability to make outsourced IT consultants or in-house IT staff understand organizational processes? All the information technology in the world won't resolve these issues, if you don't address them at the organizational level.

BONUS ITEMS: Hands-on IT skills that the CEO, CFO, **and** COO **of every small nonprofit ought to have:**

* How to compose, send, read, and delete email, using the organization's standard application.

* How to create and save a simple text document, using the organization's standard application.

* How to do the daily back up of the system.

* How to bring down and bring up the network server.

Information Technology Resources for Nonprofit Organizations

Free Information, Advice, Peer Learning, or Product Reviews

Capaciteria
http://www.capaciteria.org/

dotOrganize
http://www.dotorganize.net/

Coyote Communications
http://www.coyotecommunications.com/

Idealware: Candid Reviews of Nonprofit Software
http://www.idealware.org/

Information Systems Forum
http://groups.yahoo.com/group/Information_Systems_Forum/

N-TEN (Nonprofit Technology Enterprise Network)
http://www.nten.org/

NetSquared: Remixing the web for social change
http://netsquared.org

TechSoup
http://www.techsoup.org/

Discounted Technology Products

Consistent Computer Bargains
http://www.ccbnonprofits.com/

TechMarketplace
http://www.techfoundation.org/index.cfm?objectid=F4F21511-0D0A-3946-9D000FE02B1BE8FC

TechSoup Stock
http://www.techsoup.org/stock/

Directory of Nonprofit Technology Assistance Providers

TechFinder
http://www.techsoup.org/techfinder/index.cfm

Books About Technology Strategies for Nonprofit Organizations

The Accidental Techie: Supporting, Managing, and Maximizing Your Nonprofit's Technology
https://www.compasspoint.org/content/index.php?pid=168

The Dynamics of Technology for Social Change
http://www.amazon.com/gp/product/0595372740/103-1242422-8170209?v=glance&n=283155

Managing Technology to Meet Your Mission: A Strategic Guide for Nonprofit Leaders (to be published in March 2009)
http://www.wiley.com/WileyCDA/WileyTitle/productCd-0470343656,descCd-description.html

Nonprofits and Technology: Emerging Research for Usable Knowledge
http://www.lyceumbooks.com/iNonprofitsAndTech.htm

Wired for Good: Strategic Technology Planning for Nonprofits
http://www.wiley.com/WileyCDA/WileyTitle/productCd-0787962791.html

Online Articles About Technology Strategies

What's Involved in Technology Planning? Seven steps to a better technology plan
http://www.techsoup.org/learningcenter/techplan/page1357.cfm?CFID=18894176&CFTOKEN=51304854

Technology Triage: Keeping mission-critical technology running
http://www.techsoup.org/learningcenter/techplan/page1335.cfm?CFID=18894176&CFTOKEN=51304854

The eRider Starter Kit
http://www.eriders.net/upload/files/eRider%20Starter%20Kit.pdf

Free Online Tools

Blogger (web log platform)
http://www.blogger.com

CitizenSpeak (email campaigns for organizers and activists)
http://www.citizenspeak.org/

DimDim (web-based meeting and seminar tool)
http://www.dimdim.com

Facebook (online social networking, with applications that nonprofit can use for organizing and fundraising)
http://www.facebook.com

Grassroots.Org (web hosting)
http://www.grassroots.org/

Guidestar (information about nonprofits filed with the Internal Revenue Service)
http://www.guidestar.org/

LinkedIn (social networking for professionals)
http://www.linkedin.com/

Nonprofit FAQ (answers to many frequently asked questions)
http://www.idealist.org/en/faqcat/1-7

Nonprofit Tech Jobs (postings of job announcements)
http://groups.yahoo.com/group/Nonprofit_Tech_Jobs/

PledgeBank (online management of community-oriented pledges to take action)
http://www.pledgebank.com/

Second Life (web-based virtual reality environment)
http://www.secondlife.com/

Social Actions (aggregation of information from multiple online social networks)
http://www.socialactions.com

Source Forge (open source software that you can download)
http://sourceforge.net/

Twitter (micro-blogging and text messaging)
http://twitter.com

Wikipedia (online encyclopedia)

http://en.wikipedia.org/

Word of Blog (to create an ad for your organization that stakeholders can place on their websites)
http://wordofblog.net/

Yahoo Groups (to start your own email distribution list)
http://groups.yahoo.com/

Blogs on the Topic of Nonprofit Technology

Amy Sample Ward's Version of NPtech
http://www.amysampleward.org/

Beth's Blog (Beth Kanter)
http://beth.typepad.com/beths_blog/

Confessions of a Non-Profit IT Director (Allan Benamer)
http://www.nonprofittechblog.org/

Ext 337 (Marnie Webb)
http://www.ext337.org/

Michael Stein's Nonprofit Technology Blog
http://michaelatmo.blogspot.com/

NetSquared Blogs
http://netsquared.org/blog

Nonprofit Blog Exchange
http://nonprofitblogexchange.blogspot.com/

Technology for the Nonprofit and Philanthropic Sector (Deborah Elizabeth Finn)
http://www.cyber-yenta.org/

Zen and the art of Nonprofit Technology (Michelle Murrain)
http://www.zenofnptech.org/

Folksonomies

Del.icio.us NPtech tagging project
http://del.icio.us/tag/nptech

Social Source Commons

http://socialsourcecommons.org/

About your facilitator: Deborah Elizabeth Finn is a self-described Cyber-Yenta, an independent technology consultant who lives only to help nonprofits and foundations fulfill their missions by bringing IT needs and resources together seamlessly. She uses her blog, "Technology for the Nonprofit/Philanthropic Sector" (http://blog.deborah.elizabeth.finn.com) to make materials relevant to this workshop freely available to anyone who is interested. In addition, she is always happy to offer nonprofit and philanthropic organizations a telephone consultation at no charge, so please feel free to be in touch with follow-up questions after this workshop.

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Using Online Tools and Resources

These days, nonprofits are feeling increasing pressure to deliver information and services online. While the general considerations for technology planning continue to hold true when a nonprofit is formulating an online strategy, the following are especially important to keep in mind.

- **General Reflections:**

It's really all about your mission; it's not about the technology.

Let someone else be the beta tester.

"Ease of use" in the field of nonprofit technology is correctly defined by techno-phobic, over-worked social workers in their 50s and 60s - and not by techno-geeks.

Open source software is not a magic solution, but it can be extremely strong option for the nonprofit/philanthropic sector.

- **Reflections on email as a tool for stakeholder engagement:**

When a constituent or potential stakeholder scans his/her in-box, he/she probably take two seconds at most to decide - on the basis of the sender's name, the sender's email address, and the subject heading - whether to delete, to skip, or to read the message. If he/she decides to read the message, he/she probably takes another two seconds at most to scan the first two lines and decide whether you are going to continue reading, to delete the message, or to skip to another message. This means that you have a total of four seconds to persuade the recipient to read your email, and should craft it accordingly.

The following will probably deter a constituent from spending more than four seconds on your email:

Jagged, unjustified lines and muliple generations of quote marks. Fortunately, the fine folks at Organizers Collaborative have come up with a fre and simple tool to take care of this problem. You can find the "eWrapper" at http://www.organizenow.net/ewrapper2.shtml.

Names or email addresses of senders that are unfamiliar or don't make any sense. The latter can be a result of a mass emailing application that generates a unique string of numbers and letters for each mailing - although this may help you track responses, a hefty number of recipients will simply assume that you are sending spam.

Duplicate messages. Some of these are inadvertent, especially if your outgoing email stays on the screen after you hit the "send" command. However, if you get the same message from me three times because I haven't triple-checked my list, then I'm to blame, and I owe you an apology.

Complicated graphics, HTML, or anything other than plain text in an email. In theory, it's great to have your logo appear in the body of your email message to stakeholders, but if it takes 20 seconds for the logo to materialize onscreen, you've already lost a lot of readers.

- **Suggestions for posting to email distribution lists so that others will read and respond to what you have written:**

Trim, trim, trim! Unnecessary repetitions of previous posts, list footers, and signature lines are tedious for other members to negotiate. If you're replying to a previous message, trim away everything but the essentials of that message and your response to it.

Double-check your subject line, and make sure that it summarizes the topic. In most email distribution lists, if you subscribe to the digest format of the list, then the subject line will automatically be something like "Digest Number 123." Change it to something more topical.

Set your out-of-office auto-response so that it does not reply to every post on the list. When I'm moderating an email distribution list, I usually trim these out-of-office messages away before all the other list members have to see them, but sometimes they slip though.

Unless you are certain that your readers all live in the same neighborhood (and with an email list, you never can be), write your posts for an international readership. For example, at last count, the membership of the Information Systems Forum exceeded 4,500 people in about 60 countries, and therefore it's a good idea for those who post to the list to explain local references. For example, if someone mentions that there's a great nonprofit technology assistance provider in "Southie," people like me will understand that you're referring to South Boston (Massachusetts, USA), but anyone who has never lived in Boston will be baffled. You may also need to consider how members who live in countries other than your own can benefit from your announcements. For example, if you are planning a get-together in Providence tomorrow evening, posting an announcement to an international distribution list today is not a strategy that gives members in Estonia, Thailand, and Argentina enough time to make travel plans! Perhaps you can make the announcement a month in advance, or provide a link to a web site that will fill them in on the event after it's over.

- **Reflections on web-based tools for stakeholder engagement:**

The vast majority of first-time visitors to your organization's web site will be looking for either 1) how to contact you offline or 2) an immediate answer to a very specific question, or both. If the information they're seeking is not on your web site's home page (or if it's not completely obvious where they need to click to find the information) then your web site is failing to nurture your relationships with current and potential stakeholders.

Consider the different needs of those who use your web site. First-time visitors

will look at it differently than those who have browsed it before. Enemies, friends, board members, donors, constituents, staff members, foundation officers, volunteers, clients, researchers, legislators, and policy-makers will all be looking for different information. Visual learners will familiarize themselves with it very differently from linear thinkers. Individuals with low bandwidth, webmasters from other organizations, and users with urgent needs will all have different criticisms of your web site's layout. You may in fact need to design different tracks though your web site for different users.

When you and your nonprofit colleagues sit down to think strategically about creating a web site, you will be required to think about what people unlike yourself want and need, and about how they will look for it, and what it will take to satisfy them. This demands that you begin with an intuitive leap that is not only large but difficult. However, it's not a lost cause. You can orient yourself by selecting some web sites that you enjoy browsing and that provide you with what you need. Then select a few web sites that offend your sensibilities when you try to use them. This may tell you a lot about your particular cognitive style – which is not likely to be shared by everyone that you want to reach. However, that's extremely valuable information, because you need to be able to factor in (or out) your own preferences as you seek a design that others can use. Now, as we geeks say - *lather, rinse, and repeat*. In other words, your job is now to ask other people to browse through the web and talk aloud as they choose examples of web sites that they love and hate. Recruit people whose characteristics closely correspond to the various groups of people that you hope will love your web site. Listen. Listen some more. Take notes. Analyze what you have learned. And then congratulate yourself having taken the first step. You have just completed a shoe-string version of a web site usability test.

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An overview of online tools for organizing and collaboration

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Email (may be web-based) [Collaboration – one-to-one]	All nonprofits that need to create, maintain, or strengthen relationships with constituents.	Nonprofits that do not provide internet access for the staff and volunteers. (N.B.: In the best of all possible worlds, no organization would fall into this category.)	Free versions: http://www.gmail.com, http://mail.yahoo.com, http://www.hotmail.com

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Web-based email distribution list (also known as a listserv) [Collaboration – many-to-many]	Nonprofits that need to foster dialogue with and among constituents – especially those who have mastered email but not web-based communication.	Nonprofits that cannot devote staff hours to maintaining a dialogue with and among constituents.	Free versions: http://groups.yahoo.com/, http://groups.google.com/, http://www.freelists.org/ Email distribution list used for nonprofit purposes: http://groups.yahoo.com/group/Information_Systems_Forum/
E-newsletter (also known as an e-bulletin or e-zine) [Organizing – top-down]	Nonprofits that need to tell their stories and update constituents.	Nonprofits that lack skilled writers (and in some cases, graphic designers), or whose constituents are unlikely to read more than a few lines of any electronic communication.	Cheap: http://www.constantcontact.com (or may be offered by your web host) E-newsletter used for NPO purposes: http://www.imakenews.com/ephilanthropy/index000067805.cfm
Discussion board [Collaboration, often closed group, but structured]	Nonprofits that need to foster dialogue, mutual aid, and exchange of information among constituents that have mastered web-based communication.	Nonprofits that need to limit the free exchange of information, ideas, and opinions among staff, volunteers, and constituents. Nonprofits whose constituents lack the bandwidth to participate in a web-based information discussion or community.	Web-based board used for nonprofit purposes: http://digitaldivide.net

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Wiki [Collaboration – small closed group or open group (eg, the whole Internet)]	Nonprofits that seek to foster online collaboration in creating a knowledge base or set of documents. Nonprofits with a focused project or inquiry that is both meaningful and a good discussion starter for an identified constituency.	Nonprofits that are unable to cede editorial control to constituents and random web site visitors. Nonprofits whose constituents are uncomfortable with online collaboration or lack the bandwidth to use a web-based tool. Nonprofits that are attempting to create a document that can be published in the traditional format used for books.	Free versions: http://www.wikispaces.com Wikis used for nonprofit purposes: http://en.wikipedia.org/wiki/Main_Page http://neveragain.epov.org/
Content Management System (CMS) [Organizing – engagement depends on design]	Nonprofits that are constantly updating and changing web content, and wish to assign control of specific areas to individuals or teams that are directly involved in that aspect of the organizations' mission.	Nonprofits that don't have a need to distribute editorial control to staff members, writers, or volunteers outside of the technology team. Nonprofits whose constituents lack the bandwidth to use a web-based information source.	Free versions (eg, Drupal, Joomla, Plone) may be included with standard web hosting Web-based content management systems used for nonprofit purposes: http://www.digitaldivide.net
Blog [Organizing – with feedback possible]	Nonprofits that need to give a platform to a staff member, volunteer, or constituent with a distinctive voice or point of view. Also those that need to post announcements on the web in reverse chronological order.	Nonprofits that are unable to cede a considerable amount of editorial control to staff members or volunteers outside of the technology team. Nonprofits whose constituents lack the bandwidth to use a web-based information source.	Free versions: http://www.blogger.com, http://www.wordpress.com and many others (see http://en.wikipedia.org/wiki/Blog_software) ; may also be included with web hosting Deborah's blog: http://blog.deborah.elizabeth.finn.com

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Micro-Blog [Organizing- with feedback encouraged]	Nonprofits that need to communicate brief messages to stakeholders in a more immediate, personal, and manner. Also, those that have substantial constituencies that use cell phones and text messaging.	Nonprofits with operations that are incompatible with informality, with text messaging, or with a high level of interaction with their constituencies.	Free version: http://twitter.com
Online Petition [Organizing – top-down]	Nonprofits that want to increase their numbers in terms of membership, activism, and eventually donations. Advocacy nonprofits trying to amplify their impact on decisionmakers.	Nonprofits without an existing email communication infrastructure (e-Newsletters, etc) that can take advantage of the new contact information streaming in.	Free version: http://www.citizenspeak.org/ Example of a petition as a part of comprehensive online advocacy: http://pol.moveon.org/noescalation
Web-based social networking [Networking/Organizing]	Nonprofit staff members and volunteers who wish to reach constituents or potential stakeholders who are technologically sophisticated and comfortable with online social/professional networks.	Nonprofits that need to maintain sharp boundaries between professional and personal communications. Nonprofits whose constituents are uncomfortable with online collaboration or lack the bandwidth to use a web-based tool.	Web-based social networks used for commercial purposes: https://www.linkedin.com/, http://www.orkut.com, http://www.friendster.com/
Google Documents [Collaboration – small group]	Geographically scattered staff, volunteers, and stakeholders who need to collaborate on a single document that would otherwise be written in MS-Word and circulated via email.	Nonprofits that need provable privacy or "subpoena resistance" (eg international human rights work or HIPPA concerns)	Free version: http://docs.google.com/

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Google Spreadsheets [Collaboration – small group]	Geographically scattered staff, volunteers, and stakeholders who need to collaborate on a spreadsheets that would otherwise be written in MS-Excel and circulated via email.	Nonprofits that need provable privacy	Free version: http://docs.google.com/
Calendar [Collaboration – small group]	Nonprofits needing to share calendars across distance or without technology investment; coordination with board committees or other close constituents.	Nonprofits that need provable privacy	Free version: http://www.google.com/calendar/
Tagging [Networking – anyone can bookmark and "tag" your site. Can be used for Organizing/publicity too.]	Nonprofits desiring to drive hip, technically savvy audiences to their websites and/or create "buzz" in the online nonprofit community.	Nonprofits that don't yet have full, rich, frequently-updated, and/or enticing information on their website/blog.	Free versions: http://del.icio.us, http://digg.com, http://technorati.com
Photo Sharing [Networking – your content is mixed with millions of others'. Can be used for Organizing/publicity.]	Nonprofits with missions and stories that are more compelling when conveyed with images. Nonprofits with access to digital cameras and talented photographers.	Nonprofits unable to dedicate time to promoting, tagging, and monitoring pictures	Free version: http://flickr.com/

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Web-based telephony services [Collaboration via conference call, or one-to-one telephoning]	Nonprofits that rely heavily on telephone interaction with stakeholders, and are willing to experiment with a web-based service. Nonprofits that would benefit from integrating voice communication with text-based instant messaging.	Nonprofits with a low tolerance for variable sound quality. Nonprofits that lack access to high bandwidth internet access. Nonprofits that need to conduct individual or group conversations with all participants viewing the same document, computer desktop, or video.	Free version: http://skype.com
Web surveys [One-to-many – gathering input from stakeholders]	Nonprofits that need to institute formal votes, or gather feedback from stakeholders. Nonprofits that need to provide stakeholders with the option of remaining anonymous.	Nonprofits whose constituents are uncomfortable with web-based tools or lack the bandwidth to use them.	Free version: http://surveymonkey.com
Web tool for planning meetings [One-to-many – allows one person to find the most convenient time slot for a face to face meeting, and then announce it]	Nonprofits that currently spend significant amounts of time ascertaining when all participants are available for a meeting or other event.	Nonprofits whose constituents are uncomfortable with web-based tools or lack the bandwidth to use them.	Free version: http://meetingwizard.com
Web-Based Meetings and Seminars [Multi-lateral - deliberation and dialogue among peers, or instructional programming]	Nonprofits that need to conduct trainings or meetings but have staff, board members, or constituencies that are geographically dispersed.	Nonprofits with staff, board members, or constituencies that lack high bandwidth internet access.	Free versions: http://dimdim.com, http://yugma.com

Type of online communication tool	Highly recommended for…	Not recommended for…	Example
Virtual Reality (social communities) [Networking/Organizing/publicity]	Nonprofits trying to be a remain in the consciousness of staff, volunteers, or potential constituents outside of normal situations (work, meetings, direct mail); creative and exploratory nonprofits	Nonprofits whose staff, volunteers, or stakeholders are using dial-up modems or older computers. Overworked yet distractible staffers :-)	Free version: http://www.secondlife.com/

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