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

Identifying Talented Members

To achieve this goal, you will need leaders who possess the enthusiasm and mentoring ability to bring along reluctant members. Are there individuals in the group who have teaching or training experience? In other words, are there some members who can keep reminding the tech team of the human side of technology planning? They are the ones who will become the mentors and trainers as your technology plan is implemented.

As mentioned earlier, the cost of computer equipment has gone down sharply, and new hardware and software is often available in the form of corporate donations. In fact, the cost of the nuts and bolts side of technology actually constitutes a relatively small part of the total investment (about 30%). Costs associated with people resources are actually considerably higher. Do not forget that time devoted to training staff and volunteers must also be treated as a cost. Computerization will not be successful if a large portion of your membership cannot use the system effectively.

Matching Personalities with Responsibilities

Within your organization, there may also be individuals who enjoy working alone more than they enjoy working with people. If they have an interest in technology, there are many roles that they can productively fill, but they are not the ones who will be bringing the group along. Too often, it is these people who are chosen to lead technology projects. Although they may create highly functional computer applications, they tend to do this in isolation, and so technology does not become infused into the organization itself. They make decisions independently, responding to an agenda that is not really shared by the group. One of the hallmarks of successful organizations is that they treasure their members and find ways to bring out individual talents while minimizing the impact of negative characteristics. It is never too early to begin assessing those talents and taking note of interpersonal skills. It is also a good idea to develop a set of written policies for volunteers that clarify rights and responsibilities (see Exhibit 1.2).

EXHIBIT 1.2

Policies Governing Volunteers

While employers inquire into the qualifications and work records of applicants, nonprofits are usually grateful for any volunteer who offers assistance. Similarly, nonprofits may have no written rules governing volunteer ethics, screening, evaluation, and termination. Written personnel policies are necessary to create a safe, fair, and productive environment. Each policy should include the following information:

- Policy name, date of approval, and revision dates
- Purpose of the policy
- Persons covered under policy
- Persons responsible for administering the policy

The following are some common personnel policies intended to protect nonprofits and manage risk:

Volunteer Screening Policy

- May require volunteers to complete a personal information form
- May state that volunteer employment will be terminated for lying on form
- May require that all volunteers or those in high-risk positions provide character references
- May specify situations in which the organization may request a police check

Professional Conduct or Professional Standards Policy

- Emphasizes position of trust and accountability held by volunteers
- Establishes standards of integrity and ethical conduct

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- Describes unacceptable behavior
- Emphasizes volunteer's obligation to preserve and protect the property, assets, and goodwill of the organization
- Requires compliance with established professional, legal, and ethical standards.

Safety Policy

- Expresses organization's commitment to safe and secure environment.
- Describes volunteers' responsibility for the safety of program participants and others
- Asserts the right of volunteers to be informed of any hazardous material, practice, or process they may encounter

Risk Management Policy

- Identifies different types of risks
- Distinguishes risks to the organization from risks to individuals
- Specifies insurance requirements for certain tasks and positions

Recruitment Policy

- Lists the characteristics of desirable volunteers
- Lists special qualifications and requirements for volunteer assignments
- Describes how volunteers will be selected for different assignments
- Specifies the conditions under which volunteer applicants may be rejected
- Emphasizes the importance of meeting the personal needs of volunteers

Discrimination Policy

- Defines discrimination
- States organization's position on discrimination
- Emphasizes need for broad representation of majority and minority populations

Evaluation Policy

- Describes how volunteers are evaluated and by whom
- Sets out basis for evaluation
- Describes methods for resolving conflict between volunteers and their supervisors
- Describes follow-up to unsatisfactory evaluation

Termination Policy

- Specifies conditions under which volunteer employment can be terminated.
- Describes dismissal procedures, including verbal and written warnings, suspension, and permanent dismissal
- Lists reasons for immediate dismissal, including client abuse, immoral or indecent conduct, criminal actions, conviction for crime related to volunteer duties, acts that endanger the lives and property of others, possession of unauthorized firearms, and possession of or use of alcohol or illegal drugs
- May list work infractions that can result in termination such as missing meetings, failing to work scheduled shifts, and failing to perform assigned tasks
- May list unacceptable behavior toward customers, clients, staff, and volunteers

Confidentiality Policy

- Describes what records and other information are considered confidential
- Specifies who may have access to confidential information
- Describes penalty for divulging confidential information to unauthorized persons or organizations
- Describes where and for how long personal records will be kept
- Describes the information that can be given out in references for those seeking other paid or volunteer employment or applying for credit

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Children and Young Adults Policy

- Emphasizes the vulnerability of children and young adults
- States conditions under which volunteers may be alone with children and young adults
- Describes situations in which written parental consent is required
- Specifies the conditions under which children may be transported
- Describes limits on physical contact

Assessing Current Computer Use

Next, consider how your organization is currently using computers. Consider not only computers owned by your organization but personally owned computers used at least occasionally to support your nonprofit. Do at least some members:

- Maintain a list of members in a word processing program, database, or spreadsheet?
- Record contributions in a computer program?
- Use a computer program to schedule volunteers and/or record their hours?
- Search the World Wide Web for grants and other funding possibilities?
- Send out a newsletter that has been created with a word processing or publishing program?
- Communicate with one another by email?
- Maintain a website?
- Use a computer program for bookkeeping?

These are only a few of the possible ways you can use computers to make your organization more effective.

Where Do You Begin?

Previous experience with computers is an important part of your technology assessment. Even if members use technology for little more than email, you have some place to begin. It is also important to know whether the group has some shared experience on which to base decisions. You might think in terms of giving your organization a grade for effective use, like the ones on student report cards. Is your organization an A+ computer user or does it rate only a D– ?

If we were to concoct some sort of recipe for a successful computer project, we would begin with one large part enthusiastic computer users. Next, we would add another essential ingredient—excellent communication among group members. The recipe should include a few especially good communicators who can make sure that everyone is kept informed of developments and changes. To this mixture must be added technical support, whether from computer-sophisticated volunteers, family members, local businesses, or training professionals. In other words, help must be available to make more complex technical decisions and to "fix what's broke."

Take a good look at both your organization and your community. If you gave your organization a low grade for computer use in the question above, ask why this is the case. Were you trying to do too much? Did group members refuse to get

Tips & Techniques

Barriers to Effective Use of Technology

- Staff and volunteer reluctance
- Lack of computer or network literacy
- Lack of "buy-in" from decision makers
- Inadequate training
- Absence of appropriate and continuing technical support
- High staff and volunteer turnover rate

onboard? What does this experience tell you about the human resources that will be at the core of your technology plan? Could it be that there's been a mismatch between the projects selected for computerization and the people responsible for carrying out those projects? Only when all these human elements are understood can you begin adding the nuts and bolts to your recipe.

Choosing Your First Technology Project

It is difficult for an organization that has little or no experience with technology to plan effectively. When required to produce a technology plan by a funding agency, an inexperienced nonprofit is likely to copy a document off the Internet or borrow one from another organization. This is a mistake, since you may then be committed to a plan that is totally unsuited to your own needs. Instead, it is a good idea to begin with one small and not too demanding project. Once a project has been carried through to completion, group leaders have a better understanding of how technology fits into their goals, and they have had an opportunity to assess the computer skills of their members. It is only with such experiential knowledge that it is possible to produce a realistic technology plan. Such a project should not be too ambitious. Grandiose plans are not only unnecessary but can also destroy the confidence and enthusiasm of your group members.

Measuring Results

As this first project takes shape and evolves, it is important to take stock and evaluate its impact on the organization. This brings up the question: "How do you measure success and how do you weigh the positive results of a project against its cost?" Costs are not merely measured in monetary terms. In the "Starting Small" box (page 15), the cost of equipment and software was minimal. Much more significant was the time that the staff and volunteers devoted to planning the contributor database, collecting the information, attending workshops, and entering data. This was time, whether paid or donated, that might have been spent on other activities. In other words, it was necessary to consider what did not get done because of the project. The group was wise to choose a project that had a potentially large return.

IN THE REAL WORLD

Starting Small

One small but highly successful nonprofit decided that it would focus on only one project before developing a more comprehensive technology plan. Realizing that many group members felt hesitant about using computers, it was decided that what was needed most was a resounding success. The project chosen would consist only of creating a simple but accurate database of contributors and potential contributors. However, every single member of the organization would participate. Each was responsible for verifying existing information and for identifying a given number of possible donors. Each attended workshops to learn to use the database and followed written instructions for entering information. It was not until group members felt satisfied that they had a firm grip on the contributors' database that they returned to their technology plan and considered future computer development. As might be expected, it was discovered that this was far from the most efficient way of creating a database and errors were not uncommon. However, in the end the project resulted not only in a useful resource but in a group of enthusiastic, computer-literate volunteers as well.

By improving the quality of the information available on contributors, the organization was able to be more effective in its fundraising efforts. Since considerable attention was paid to training, group members emerged from the project with new skills that could be used later for other projects.

Comparing Alternate Projects

While the group was trying to decide on their first computer project, a number of voices were raised in support of projection equipment and PowerPoint software. You've undoubtedly attended programs at which the speaker accompanied his or her presentation with a variety of colorful slides. These are usually produced with Microsoft's PowerPoint software program loaded on a laptop computer. A special projector, controlled by the program presenter, is connected to the laptop. Audiences usually pay more attention when they have something to look at, and nervous presenters are more comfortable because the advancing slides act as cues, triggering their

memories and preventing them from losing their places. Speakers also feel more relaxed because the eyes of the audience are busy taking in the slides and are not watching their every move.

As part of their fundraising activities, members of this small nonprofit group make a lot of presentations to local clubs, government agencies, and other organizations. PowerPoint capability was the first thing some members thought of when asked to choose a computer application. Others in the group supported the contributor database described above. Which should they choose: the contributor database or PowerPoint presentations? The best way to make such a decision is to analyze the costs and benefits involved in each.

Analyzing the Cost of the Database Project

Let's begin with equipment costs. To build and maintain the contributor database, the group must obtain at least one desktop computer. The database they have in mind will make no unusual demands on a computer like special sound or video cards. It should, however, be equipped with a CD "burner" (a CD-ROM drive that can both read from and write to a disk), so the database can be backed up easily. Such a computer equipped with a monitor can be purchased for approximately $600.00 to $800.00.

The group will also need a printer to produce lists of contributors' phone numbers and other needed information for use by fundraising volunteers. Although printer costs range from one hundred to several thousand dollars, a lower end printer will meet their needs. Let's say that a satisfactory printer can be purchased for about $300.00. An expense that is not often considered is the cost of printer toner cartridges. For printers in this price range, toner cartridges cost about $35.00 each, and it is usually necessary to have one cartridge for black text and another for color printing. Let's say that since the group will be doing only occasional printing, the annual cost of cartridges will be about $100.00 a year. No phone line or Internet connection is needed so total hardware costs for the database project will be about $1,000.

Analyzing the Cost of the Presentation Project

To produce and project PowerPoint slides, it will be necessary to obtain both a laptop computer and a video projector. These are two very expensive pieces of

equipment. Equipment prices are changing rapidly, but the cost of a laptop computer usually runs about twice the cost of a desktop computer. We will, therefore, estimate the cost of the laptop at about $1,200. Prices for video projectors have remained high because their market is relatively small. Home users purchase laptops in large numbers, but they do not purchase projection equipment. Cost is based mainly on the brightness of the lamp and, at this writing, a medium-quality projector can be purchased for about $1,500.

A printer will also be needed to produce the handouts that are usually distributed to audiences, so we'll add another $300.00 and, assuming the same printing volume as above, we will add an additional $100.00 for toner cartridges. This brings the equipment total for PowerPoint capability to $3,100.00. Although it is possible to produce PowerPoint presentations without access to the Internet, most users copy their visual images from the Web. If the group does not have an Internet connection, they will have to produce their own images or do without. Images can also be created with digital cameras, but since neither a camera nor an Internet connection is absolutely essential, we will not include them in this cost estimate.

Software costs in this particular example are actually identical. The group has learned that it is eligible for a donation of the Microsoft Office suite. The professional edition includes, in addition to a word processor and several other modules, both PowerPoint and Access, an excellent database program. If, however, only the standard version of Microsoft Office were available through donation, the cost would be calculated differently. PowerPoint would still be included, but since the standard edition does not include a database program, it would have to be purchased separately.

Additional Costs

Hardware and software are not the only costs. How many people will have to be trained to use both hardware and software? Since this is the first project, training is an important part of it. This will be a good opportunity to get everyone involved in computerization, and so extensive training will be required for the whole group. Whether you bring in a professional trainer or use your own staff and volunteers, training is a big investment. It requires substantial time that could be spent on other activities.

Most people find it easier to master PowerPoint than learn to use a database program effectively. On the other hand, equipment setup is the most difficult part of using presentation software. While the desktop computer is always available and never requires special setup procedures, both the laptop and the projector must be reconnected each time they are used. Volunteers insist that there seem to be dozens of cords, including an AC power cord for each piece of equipment, cables to connect them, a power strip and extension cord, a mouse for the laptop, and a remote control device to advance the slides. To feel secure when an audience is waiting for the program to begin, volunteers must practice setup procedures again and again before the big event. Otherwise, they may become flustered and confused. It would probably be reasonable to say then that the complexity of the database is roughly equivalent to the difficulty involved in PowerPoint setup procedures. Training costs and the related time and energy involved in learning to use both programs will, therefore, be similar.

Identifying the Benefits of the Database Project

Now that the group has estimated both monetary and human costs of both projects, they are ready to focus on the benefits of each. In the end, a computer-literate staff and volunteer corps may be the most important long-term result of both projects, but let's focus on more immediate gains. Both projects are intended to help the group with their fundraising efforts. That will make it easier to compare the two, since we can then ask which project is more effective in achieving fundraising goals. Of course, answering this question requires guesswork, but yours is not the only organization making technology decisions. There are many other nonprofits in your locality and at least some have participated in similar computerization projects. What was their experience? What worked for them, and what did not?

One local nonprofit created a database for donor information similar to the one being considered. This meant that when the organization conducted a fundraising drive, it had the names, addresses, phone numbers, and donation histories of everyone who had contributed in the past. The group also had similar information on prospects identified since the last drive. They could not really estimate how much additional revenue the database had generated. However, they thought that if they

had to start from scratch each year, they would waste a huge amount of time assembling information and would still miss a lot of possible contributors. Knowing the amount of previous donations also meant that they could ask for a specific amount of money. Although this sister nonprofit could not assign a dollar amount, they knew that the database had significantly improved their ability to raise funds. When they considered what they had spent in terms of both time and money, it seemed well worth the investment.

Identifying the Benefits of Presentation Support

Another local nonprofit had purchased both a laptop computer and a video projector for their speaking engagements. A volunteer produced a PowerPoint program that members could take with them when invited to speak to groups. When approached about their experience, the group's contact person was somewhat less than enthusiastic. It was true that when members learned to use the equipment correctly, the PowerPoint slides enhanced the quality of their programs.

What they discovered, however, was that they had overestimated the number of presentations they really made. Someone from the group might be asked to speak to a local club about once every two months. They had also made occasional presentations to the city council and had twice held a public meeting at the library. Let's say, then, that the equipment was used 8 to 10 times that year. For the remainder of the time, it sat in a closet gathering dust. Although everyone had been trained on setup procedures, members soon forgot how to connect all those tangled cables. After an embarrassing experience in front of a restless audience, a speaker might avoid using PowerPoint again.

Had the ability to project PowerPoint slides made it possible for the group to raise more money? It was hard to say. Of course, their programs were more interesting, but it was really impossible to know the extent to which they contributed to their fundraising capability. Other groups, naturally, had different experiences to share, but the bottom line seemed to be that spending $3,000 for equipment that was used less than 10 times a year with no clear benefits did not seem to make sense (remember that the monetary costs of the PowerPoint project were much higher than the database project—$3,100 for projection equipment versus $1,000 for a

TIPS & TECHNIQUES

Making Technology Part of the Project

Here's a step-by-step procedure for planning a technology project:

- Identify a problem that needs attention.
- Decide exactly what needs improvement. In other words, what aspect of the program is not working as well as you would like?
- Decide what you want to happen. Identify desired outcomes. What should be different after the project is implemented?
- Identify the people who can make it happen.
- Decide how much you can spend.
- Divide the project into small pieces or segments.
- Assign responsibility for each segment.

desktop computer). It was, therefore, decided that the group's first computer project would be the contributor database. After this goal had been achieved and the database was in use, the group might consider PowerPoint again. However, they now knew that a number of organizations in their area owned the needed equipment, and it was usually sitting in a closet somewhere gathering dust. When it came time to implement a PowerPoint project, they would either borrow or rent the equipment as the need arose.

Creating a Written Technology Plan

Once the tech team has assessed its technology resources and focused on a practical starting point for its efforts, they are ready to begin making technology an integral part of their organization. They are ready to begin developing a formal plan that will guide their organization through the next several years. The plan will allow them to make wise purchases and channel their efforts into the most productive projects. Other good reasons for developing a technology plan are listed in Exhibit 1.3.

EXHIBIT 1.3

Why Do You Need a Technology Plan?

Although there are literally dozens of reasons why creating a technology plan is worth the effort, you may need some additional justification if your group seems somewhat reluctant. Here are just a few ways a technology plan can enhance the effectiveness of your organization:

- Saves money on technology because you buy only what you need.
- Provides a valuable a tool to help you accomplish your mission.
- Helps your organization obtain funding. Funders respond to organizations that take technology seriously.
- Encourages members to discover new ways to integrate technology into their work.
- Makes your nonprofit more productive. Planning ahead avoids mistakes.
- Allows you to anticipate equipment failure before it happens.
- Makes it possible to use staff time more effectively.
- Provides documentation of existing systems. This is invaluable when information is lost due to turnover.

In addition, the technology plan will be used to show funding agencies that the organization has assumed firm control of its technology program and can be trusted to make effective use of funds provided for this purpose.

Looking Ahead to the Future

While part of the plan will be quite concrete and specific, some intelligent "crystal gazing" will also be necessary, since it is difficult to look into the future and imagine what one's needs will be. In planning and completing that first project, the group learned a lot more about the skills of its members and the other resources at its command. This information will help them identify training needs and determine the pace of innovation. What are some logical next steps? One desktop computer

TIPS & TECHNIQUES

Five Keys to a Successful Technology Program

- Focus on stakeholders. You must have buy-in from the whole group.
- Limit dependence on consultants. It is your plan, not theirs.
- Emphasize diversity on the tech team. Involve volunteers, board members, administrators, staff, and even clients.
- Nurture a pro-technology culture within the organization.
- Emphasize continuity. The tech team's job is not finished when the technology plan is written.

may be sufficient to get started, but the staff will soon need more computers. No matter what an organization's focus, it is all but inevitable that it will need to expand its computer capability, but how rapidly? How much can the organization afford to spend and what does it hope to accomplish?

Gradually, ideas takes shape but now the group must consider the time factor. Over what period of time will the plan be implemented? Some experts advise three-year technology plans because the computer world changes so rapidly. Five-year plans are common because of the considerable effort involved in their development, but such plans should include provisions for reviews and updates within that period. Be sure to include completion dates for each phase of the plan. It is important that the group be able to assess progress and know whether or not they are on target. Of course, some parts of the plan will take more time to implement than anticipated, but the timeline should be specific enough to alert the group to problems and delays.

Developing Technology Leadership

People are really the most important element of any technology plan, so make sure you give at least as much attention to the human side of technology as to hardware and software matters. How will you develop technology leaders? What will it take

to create a core of computer-literate decision makers and trainers? How will they be identified? What skills should they possess? What skills will they need to acquire? Remember that the trainers themselves must be trained.

Discovering Community Leadership Resources

An important part of the technology plan concerns interpersonal networking or developing relationships with key individuals and organizations. This becomes especially important when it comes to nurturing technology leaders. Does your local chamber of commerce provide technology workshops for the business community? Does the community college offer noncredit computer courses? Is there someone in the community who could be persuaded to provide pro bono training in a computer lab at the local high school? Consider what resources might be available outside your organization and how you might go about taking advantage of them.

Educational Opportunities for Leaders

Of course, your technology leaders will need to stay abreast of changes in technology, so an ongoing program should be developed to meet their needs. Are there conferences they should attend? Should the organization purchase a small collection of books, manuals, and magazines devoted to technology? All of these components should be melded together into a brief list of leadership objectives, including a timeline for achieving goals, and a budget to cover essential expenses.

For a technology program to be successful, nonprofit decision makers must actively support technology. This means that board members cannot be computer-phobes who regard technology as none of their concern. Leadership in any nonprofit comes from its board, so board members must be the first to receive support. Although they need not be highly sophisticated computer users, board members must fully understand what technology can and cannot do for their organization. This may mean working with a consultant or conducting special training sessions for board members. Exhibit 1.4 summarizes the elements that together make an effective technology plan.

LEARN MORE ABOUT

Online Resources for Board Members

- Find tools for building strong and effective boards from BoardSource at www.boardsource.org.
- Read the Board Development FAQ at www.allianceonline.org/FAQ/board_development.
- Take a look at the Board of Directors FAQ at www.nonprofits.org/npofaq/keywords/1a.html.
- Read about Building and Managing a Better Board at www.enterprisefoundation.org/model%20documents/1105-Building&ManagingBetterBoard.pdf.
- Get the Complete Toolkit for Boards at www.mapnp.org/library/boards/boards.htm.

EXHIBIT 1.4

Characteristics of a Good Technology Plan

- It is more like a roadmap than a wish list.
- It includes both the route and the destination.
- It includes recommendations on policy, professional development, and staffing.
- It is characterized by a holistic approach to planning.
- It assigns responsibilities.
- It addresses the decision-making process.
- It includes methods for evaluating success.

Identifying Training Needs

Once leaders have been identified and trained, how will other members of the organization become full participants? Will everyone be expected to use the computers or will system passwords be restricted to a smaller group of regulars. It may not be necessary for every single member of the group to be able to use every computer program. However, when the only volunteer who knows how to use the bookkeeping program moves away, chaos can ensue. Certainly, a significant portion of the membership must be fully trained. Once trained, they will need "brush-up" sessions to keep up their skills.

Planning an Effective Training Program

Most of this training will be done by group leaders. Occasionally, however, it is a good idea to bring in a professional from the outside who can "rev up" enthusiasm and bring the group information about recent developments. What about training materials? All computer users will need study materials for workshops. In addition, they will need manuals and written instructions near at hand when they are doing their work. This means that you will probably need a materials budget to cover photocopying, as well as commercial materials. You may also want to purchase some videos or DVDs that demonstrate basic Windows skills. Once again, these plans must be condensed into a set of objectives, accompanied by a timeline and a budget.

The Nuts and Bolts of Technology

It is only at this point that you can begin to consider the equipment side of your technology plan–specifically the computer system and its functions. By this time, used equipment is very likely being left on your doorstep, so donations should probably be the first issue to consider. Bear in mind that a three-year-old computer is at the end of its useful life. Of course, a three-year-old computer still runs (you hope) and an individual owner may want to keep it around the house for a while. However, it is useless as an integral part of your organization's computer system. It may not accommodate newer software and could endanger any records stored on it.

TIPS & TECHNIQUES

Getting Help for Technology Planning

If you feel ill-prepared to develop a technology plan, consider the following readily available sources of help.

- Your local business community.
- Family and friends of group members.
- Technical support staff in other nonprofits.
- Email discussion lists.
- Websites for nonprofits such as TechSoup.
- Community foundations.
- Nonprofit management centers.
- Interns from local colleges and universities

Establishing Hardware and Software Standards

On the average, hard drives "die" or become unreliable at about 4 years. You do not want to entrust valuable information about your organization to a hard drive that has a very good chance of self-destructing within the next year.

Most people do not remember how old their computers really are. They may have purchased discounted computers that were being discontinued, so the equipment was about a year old when purchased. It is also hard to keep track of time, and it may seem like only yesterday we purchased a computer when actually several years have elapsed. The best way to avoid obsolete computers is to maintain a set of standards. All computers maintained by your organization should meet certain minimum requirements that include speed, hard drive capacity, random access memory (RAM), and other basic considerations. Of course, such standards are quickly outdated, so a mechanism should be established to review requirements annually. The complete list of requirements need not go into the technology plan, but the mechanism for creating and reviewing it should definitely be included.

If you keep these written equipment requirements readily available, it becomes a great deal easier to reject unwanted donations without hurt feelings. If potential donors have lost track of the printed materials that came with their computer, you can explain to them that it is easy to click on "System Information" on their Windows menu. They might wish to print out the information displayed and bring the printout to you rather than the computer.

Try Before You Buy

Starting out with donated equipment can give your group members an opportunity to become comfortable with computers. By installing some simple application software, you begin to get an idea of what works best and how information can be effectively shared. Before making any purchases, however, this experience must be refined and realistic goals must be set. What computer applications can you reasonably expect staff and volunteers to master and which would most benefit your organization? Develop a timeline for implementing these applications, including purchasing needed hardware and software, developing procedures, training users, and entering data.

Donations of New Hardware and Software

What purchases will need to be made and what can be obtained through corporate donation? Elsewhere in this book we discuss sources of such donations. It may happen, for example, that one database program is available free or at a heavily discounted price. Will you choose this program or pay full price for another program that offers additional features? How will you make the decision? What considerations will be most important when choosing software? The same kinds of decisions must be made when selecting hardware. How will you measure the advantages of obtaining free or inexpensive hardware against the disadvantages? Your technology plan cannot include specifics, but it can spell out your priorities such as reliability, economy, and customer service.

Most of all, your technology plan must reflect your commitment, not to technology since that is merely a means to an end, but to maintaining accurate records

TIPS & TECHNIQUES

Implementing Your Technology Plan

Once your technology plan is written, do not file it away. Make it happen! Here are some suggestions:

- Remind yourself and others of the benefits the plan will bring.
- Evaluate your progress monthly.
- Break the plan down into "doable" components.
- Earmark funds as they become available. Do not let them slip away.
- Appoint an implementation manager.
- Implement the plan one item at a time, and take time to enjoy the results.
- Keep up the momentum.

and achieving your nonprofit's goals. This means taking charge of technology and not allowing it to develop a life of its own, possibly endangering your organization.

Summing It Up

Because computers are so inexpensive and so readily available, they commonly find their way to nonprofit organizations. A gaggle of computers, however, does not equal a technology program. When intelligently conceived and administered, technology can contribute significantly to your group's success. However, the focus must be on people, not machines. A computer is a tool like a pencil or a stapler. It can be of no use unless it is brought under the control of knowledgeable individuals who harness its power in a well-thought-out plan of action. Only when computers are fully integrated into your organization and their roles are carefully delineated can a technology program be truly effective.