

Advice from the Field

Nonprofit Technology Management



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Overview

- ① Assessments & Inventories
- ① Technology Life Cycle
- ① Planning
- ① Staffing, Hiring & Volunteers
- ① Technology Policies

Reasons NPOs Struggle with Technology

- ⦿ Unrealistic expectations based on poor information
- ⦿ Not considered central to organization's mission
- ⦿ Seen as expense to be minimized rather than investment to be leveraged
- ⦿ Lack of ownership in technology roles
- ⦿ Organizational culture resistant to change
- ⦿ Easy to neglect ...until major failure occurs

Technology Assessments

- *“What technology assets do we have, how do we use them, what’s working and what needs attention?”*
- Assessments can help identify organization-wide problems with productivity, efficiency, communication and security
- Begin assessment process with thorough inventory
- Self-assessments of staff computer skills less objective than interviews or tests
- Store assessment & inventory documents in shared network location for easy reference & updates

Areas to Inventory	
Hardware	Software
Networks	Databases & web sites
Services	Staff skills

Technology Life Cycle

Planning

- Setting goals
- Analyzing requirements
- Comparing alternatives
- Budgeting

Deployment

- Setup & configuration
- Frequent changes
- Low productivity
- **Negative ROI**

Production

- Routine maintenance
- Predictable, steady state
- Minor problems & adjustments
- Increasing productivity
- Breakeven on costs
- **Positive ROI**

End of Life

- Demands exceed capacity
- Reliability, performance problems
- Increasing maintenance costs
- Decreasing productivity

Technology Planning

- Technology critical to most nonprofit organizational functions
- Build case for technology improvements on solid business reasons: security, capacity, productivity, ROI, TCO
- Involve stake holders and end-users in process as much as possible
- Regular, incremental changes usually better than infrequent, massive changes
- Be realistic about the rate of change your organization can tolerate

SMARTER Technology Goals

- Include performance criteria, delivery dates, funding sources and provision for maintenance in written goal statements

“The new office server will be deployed and fully operational by 6/30/10 & staff training will be complete by 7/15/10. We’ll contract with ComputerGuys for server purchase, deployment and training. Server hardware, software, installation & staff training expenses will be funded through the MegaCorp grant we received in April 2010. Routine server maintenance will be handled by our tech support staff supplemented by quarterly checkups under contract with ComputerGuys. Maintenance to be funded from existing tech budget. Estimated server lifespan is 60 months.”

- Assess actual performance relative to goals to improve process for future projects
- Technology planning is an ongoing process that must be addressed as the organization grows & changes

Technology Roles in Small Organizations



Help Desk / Tech Support

- Troubleshoot computer hardware & software problems to support end-user productivity



Network / Database Administrator

- Maintains network services, servers and mission critical line of business applications like web sites & databases, enforces policies



Director of Technology / IT Manager

- Executive decision maker for budgeting, planning, policy formulation and hiring for technology positions

Technology Staffing

- “**Accidental techie**” typically person with least fear and/or greatest dependence on technology
- At least one staff member needs formal responsibility & authority for routine & higher level tech decisions
- Desirable to move current staff into tech positions when possible
- Enable your tech support staff to succeed by providing them training, budget, outside assistance and management support
- Real World Example
 - > Tech support, training & system administration for NPO with 25 staff & 75 computers is approximately 1 FTE

Hiring for Tech Positions

- Begin recruiting process early and with as thorough a job description as possible
- Accurately describe position responsibilities, scope & technical details in job posting
 - “Provide technical support & network administration for 18 end users on a network of 15 desktop & laptop computers running Microsoft Windows XP Professional, Microsoft Office 2003 & 1 server running Microsoft Windows Small Business Server 2003 R2. Maintain and enhance Access 2003 databases used for tracking donors and service delivery metrics. Enforce computer and network usage policies as directed by management.”*
- Emphasize non-monetary benefits to help sell the position
- Industry certifications, testing can help determine technical competency
- Candidate's organizational fit, integrity & commitment usually more important than technical expertise

Technology Volunteers

- Is the project in organization's best interest?
- Clearly define project deliverables, scope & timeline
 - "Complete 90 minutes of 1-on-1 Microsoft Office 2007 training for each full time staff member by September 30, 2010"*
- Allocate sufficient staff time to manage the volunteer project & provide adequate resources
- Require thorough documentation of work performed, especially for technical projects
- Acknowledgement & appreciation of volunteer's effort critical; results of technology projects not always visibly apparent

Technology Policies

- Effective policies anticipate problems, secure data, increase accountability & protect organization legally
- Examples of technology related policy areas
 - Security
 - Appropriate computer usage
 - Former employee data retention
 - Acceptable computer hardware donations
 - Using personal devices (laptops, smart phones) for work in the office
- Policies need to be reviewed & updated for changes in organization, environment & technology

Resources

- ◉ Donated software & hardware, advice, training & more
<http://www.techsoup.org/>
- ◉ Nonprofit technology community, education & inspiration
<http://www.nten.org>
- ◉ The Accidental Techie, Sue Bennett, Compass Point-Fieldstone Alliance, 2005
- ◉ Managing Technology to Meet Your Mission, Ross, Verclas & Levine ed., Jossey-Bass, 2009
- ◉ FVCC Continuing Education computer courses
<http://www.fvcc.edu/resources-for/businesses-community/workforce-development/computer-workshops/>
- ◉ Microsoft Volume Licensing Service Center
<https://www.microsoft.com/licensing/servicecenter/>