Technology Grantmaking Toolkit

Practical tools for technology grantmaking in Canada's voluntary sector

About the Changing Technology Funding Practices Project ...

This paper was prepared for the Changing Technology Funding Practices Project, an initiative funded through the Voluntary Sector Initiative (VSI) Information Management / Information Technology (IM/IT) Secretariat, and housed within Industry Canada. The VSI is a joint initiative between the Government of Canada and Canada's Voluntary Sector.

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Introduction: Making strategic tech a voluntary sector reality

The Internet and other networked technologies have become central to the way Canadian voluntary organizations work with each other and with the communities they serve. Of course, these new ways of working have lead to changes in the needs of voluntary sector funding as well as new challenges for Canadian grantmakers.

The Changing Technology Funding Practices Project consulted with grantmakers and voluntary sector staff to identify and respond to these challenges. This Toolkit was developed in response to the near universal call for practical tools to help funders and not-for-profits deal with technology planning and funding.

Technology and voluntary sector organizations

Canadian grantmakers and voluntary sector representatives agree that a majority of Canadian voluntary organizations now have access to technology basics — a computer, Internet access, and support. However, many organizations still have a hard time finding money to pay for these basic tools.

Canadian grantmakers understand that technology has become an important component of any successful voluntary organization. However, many feel that they lack the expertise or information necessary to evaluate technology-heavy project proposals. Additionally, there is concern among grantmakers that many voluntary sector organizations do not yet fully appreciate the real operational costs associated with becoming more technology reliant in day-to-day operations.

Finally, while some voluntary sector organizations have used technology-based solutions to pursue their mission, most have not moved beyond basic e-mail, word processing and web sites. A more strategic, mission-focused approach — delivering services online, creating virtual collaborations, mobilizing volunteers with e-mail — is necessary for the sector to realize the real social benefits of technology.

Where do we need to go?

In sum, there are three major technology challenges facing Canadian voluntary organizations and the people who fund them: 1) keeping basic infrastructure up to date, 2) building and maintaining technology skills, and 3) using technology for strategic, mission-based projects and initiatives. For the voluntary sector to overcome these challenges, we believe that there is a need to:

1. Accept that computers, Internet access and support are voluntary sector "must haves."

2. Shift our thinking about technology in the voluntary sector, from "boxes, cables and software" to strategic, mission-driven uses of the Internet and other networked tools.

3. Collectively, raise the capacity and comfort level of grantmakers to assess projects that have a technology component.

4. Understand that the power of technology lies primarily in networking people.

Making these changes doesn't necessarily mean relying on more and more technology. Rather, it means using technology more effectively, so that it 'disappears' into the background just like all of the other tools and infrastructure that voluntary sector organizations strategically use to support their mission.

The Changing Technology Funding Practices Project is focused on helping grantseekers and grantmakers reach this point.

Getting practical

Of course, reaching the point where computers and the Internet are tools that are easily, skillfully and effectively used requires change on many levels – changes to the culture of the voluntary sector, to the policies of funding organizations and to the day-to-day practices of voluntary organizations.

This toolkit is focused on the practical aspects of making this change. It demonstrates that good technology planning and decision-making is based on the same kind of strategic planning principles already used by the voluntary sector for everything from program development to running a campaign. And that grantmakers, building on skills they already have, can easily evaluate project proposals that use technology to support and achieve mission-based work.

The approach taken by this toolkit is simple – describe core technology planning principles in clear, plain language and provide readers with the tools needed to apply these principles. Where possible, we have also included links to templates and other articles that will further help voluntary sector organizations and grantmakers with technology planning and decision making.

The tools of this toolkit have been developed to help both grantseekers and grantmakers develop the skills to:

Grantseekers	*Grantmakers*
Assess the current technology capacity of their organization ... and plan for upgrades and improvements	Assess the technology capacity of grantees ... and help to ensure that basic capacity is in place
Plan and budget for basic infrastructure, such as computers and Internet access	Better understand the technology costs that grantees need to cover for each person in their organization
Write a plan for a strategic technology project ... and integrate this plan into a funding proposal	Recognize what to look for in a proposal for a strategic technology project ... and help grantees improve proposals of this nature
Evaluate outside expertise to help with technology projects	Ensure that grantees have the tools needed to make good decisions about consultants

Grantseekers	Grantmakers
Find additional resources that will help with technology planning and funding	Find additional resources that will help with technology evaluation and funding

With this knowledge in hand, voluntary sector managers will be better equipped to ensure that the technology basics are supporting the efficiencies of their organization and that technology is integrated into broader strategic planning for programs, services and campaigns. Grantmakers will be in a position to both understand whether technology requests from their grantees make sense and to help grantees integrate technology effectively into the projects for which they seek funding.

1. How can not-for-profits use tech strategically?

Objective: *Show the potential of using technology strategically to increase the community impact and effectiveness of voluntary organizations.*

The following case studies highlight a number of promising practices that demonstrate how voluntary sector organizations can best use technology in support of mission work. These include:

1. Understand what your target audience needs
2. Use technology in service of your mission
3. Do your research before you implement new technology programs
4. Plan to evaluate your technology projects
5. Start small
6. Consider strategic (even unlikely) partnerships
7. Appreciate how technology can support and draw-on staff resources
8. Commit to making a website more than a simple online brochure
9. Invest in online community-building
10. Include marketing outreach in all technology-based projects
11. Use viral marketing and other Internet-specific techniques when appropriate
12. Build on open standards – don't get sucked into proprietary software

We believe that practices like these contribute to the success of voluntary sector technology projects. These case studies illustrate what this success looks like in action.

Ability Online

Best Practices Highlighted

1. Understand what your target audience needs
2. Use technology in service of mission
9. Invest in online community building
12. Build on open standards – don't get sucked into proprietary software

Ability Online is a computer friendship network where children and youth with special needs connect to each other, to their friends, family members, caregivers, and supporters.

Launched in 1992, Ability Online was founded by a psychologist at the Hospital for Sick Children in Toronto who wanted to help hospitalized children overcome the isolation and disruption of their school and social lives by creating a way for them to easily communicate with their peers.

Today, Over 3,000 children a month from around the world are active on the www.abilityonline.org network. Members make friends online, chat and ask questions about things that interest them, share stories and jokes, and discuss their favourite movies and musicians. Best of all, through Ability Online, children find support and friendship online 24 hours a day, 7 days a week.

For a sick or injured child isolated from friends and sometimes family, technology helps them maintain and build social networks and provides these challenged young people with access to the emotional support they need to aspire to their dreams.

Big Brothers and Big Sisters of Canada

Best Practices Highlighted

1. Understand what your target audience needs
2. Use technology in service of mission
3. Do your research **before** you implement new technology programs
4. Plan to evaluate your technology projects
6. Consider strategic (even unlikely) partnerships
9. Invest in online community building

Big Brothers and Big Sisters of Canada, www.bbsc.ca, has built on their traditional one-to-one, regular contact between the mentor and the "little" to create their **Digital Heroes** program — an electronic version of the traditional Big Brothers / Big Sisters mentoring program that has been proven to have a very positive impact on school attendance, grade achievement, motivation and self-confidence.

Through the Internet, e-mentoring provides young people with unequalled access to volunteer mentors in a convenient communication which is appropriately monitored and evaluated. It allows mentors and "littles" to communicate across long distances, something which would not be possible in a traditional one-to-one mentoring relationship. It allows youth in rural settings who do not always have access to mentoring relationships to benefit from such an experience. Finally, it allows adults whose schedules or life circumstances do not allow for a traditional mentoring relationship to participate in one that accommodates their situation.

To launch the Digital Heroes pilot project, BBBSC partnered with AOL Canada, which provided internet accounts for 100 e-mentoring relationships in 2002, training, and support for promotion and program development. Once the pilot project is evaluated, Big Brothers and Big Sisters of Canada plans to develop a packaged program that can be made available to all its member agencies. The Digital Heroes program is a great example of how technology can help a service organization deliver its programming.

Calgary Inter-Faith Food Bank

Best Practices Highlighted

1. Understand what your target audience needs
2. Use technology in service of mission
6. Consider strategic (even unlikely) partnerships
7. Appreciate how technology can support and draw-on staff resources
8. Commit to making a website more than a simple online brochure
9. Invest in online community building
10. Include marketing outreach in all technology-based projects

Calgary Inter-Faith Food Bank is dedicated to gathering and distributing quality emergency food to some 127,000 Calgarians in need. Like many large charities, they have an online presence.

Originally, the Food Bank's website, www.calgaryfoodbank.com, was built to educate local residents about the scope of their operations. What they wished for was the ability to collect cash donations online. Thanks to the generosity of an anonymous donor, in 2001 they were able to add that feature. But simply having a "donate" button did not translate into many on-line gifts.

Calgary Inter-Faith Food Bank leveraged it's technology upgrade with a good old-fashioned community partnership. One of their allies, a local online grocery store, accepts donations to the Food Bank at their site. Online shoppers of **Sunterra Market** simply make their food donation selection and delivery is taken care of by the Food Bank.

Other simple applications have helped the Calgary Inter-Faith Food Bank streamline their volunteer application process and stay in touch with volunteers by email and a regular e-newsletter.

Ludolettre

Best Practices Highlighted

1. Understand what your target audience needs
2. Use technology in service of mission
9. Invest in online community building

Ludolettre (www.ludolettre.qc.ca) is a Quebec-based literacy organization that effectively uses technology to deliver its programming to adult learners.

Recognizing that illiteracy is a social problem that negatively affects people's self-esteem, and that the task of handwriting numbers and letters can be difficult for some learners, Ludolettre developed a literacy program using keyboard technology since typing, as opposed to handwriting, helps learners avoid making mistakes, write "neat" text and thus, increases their sense of self-worth.

After 16 years, the program has proven itself to benefit low literacy adult learners. The ongoing challenge for Ludolettre is as simple to understand as it is difficult to stay on top of with dozens of individuals using their computers every day: computer maintenance and repair. Originally, well-meaning but untrained volunteers filled the role of computer technician, however experience taught the staff that budgeting for and hiring *trained* computer technicians is worth every dollar. Without well-maintained and functioning computers, the Ludolettre mission and clients cannot be served.

2. What does strategic tech grantmaking look like?

Objective: Show how selected Canadian grantmakers have incorporated technology funding into their granting policies and the impact this has had on the voluntary sector.

While tapping the power of computers and the Internet within the voluntary sector certainly requires ideas and vision, it also requires money. The following case studies profile five Canadian grantmaking organizations that have a strong track record funding technology. All of these organizations understand both the importance of technology basics and the power of advanced strategic technology projects. They also understand that both culture and policy changes must often be made in order to ensure that technology can be effectively supported by funders.

The Muttart Foundation

The Muttart Foundation is focused on supporting social service organizations in Alberta, Saskatchewan, the Yukon, and the Northwest Territories, particularly those related to children and youth. In recent years, the Foundation has also been active in programs that increase the capacity of the charitable sector generally.

Muttart's focus is on holistic funding for the agencies it supports, looking at all aspects of capacity from program focus to organizational systems. "Our interest is in strong organizations, and we see technology as a part of this," says Muttart Executive Director Bob Wyatt. Muttart has included provisions to support the purchase of hardware, software and technology services since 1992.

Muttart began to focus on supporting technology even more heavily in 1999. At that time, the Foundation began working with another funder to expand the pool of resources available to help organizations dealing with Y2K challenges and other upgrade issues. In addition, the Foundation added Chris Burcell – an 'e-rider' or roving tech support expert – to its staff. Chris' job was to help grantees make good technology decisions and, occasionally, to get his hands dirty and help with technology roll out. The combination of resources and expertise has led time and again to well-developed, lasting technology investments within the organizations that Muttart funds.

A case in point was Muttart's support of the Camrose Association for Community Living in 2001. With nine locations and over 50 employees, staff and volunteers at Camrose were running from computer to computer with floppy disks every time they wanted to update the client database. Realizing that this was costing money and standing in the way of service improvements, Muttart and Camrose came up with a 'technology transformation plan'. As a foundation, Camrose was given a grant of $200,000 for technology upgrades, as well as funding to upgrade hardware, software and other infrastructure. In addition, Chris at Muttart worked with Camrose's new IT person to network-enable the organization in the course of a single weekend. Chris showed up at 5pm one Friday afternoon and had the network in place and operating by 9 am Monday, staying around two extra days to trouble shoot.

This approach not only got Camrose networked quickly, it also contributed to lasting technology capacity. The new IT person learned a great deal from Chris and was able to maintain the

network on his own. It is worth noting that 'technology sustainability' was a part of the bargain. Camrose was required to set up a technology reserve fund as a condition of their grant, with the intent that this would save them from coming back to Muttart looking for future upgrade funds. Three years later, the internal technology fund is in place and Camrose is using its own budget to cover the cost of the IT person it hired with the original grant.

Muttart's Wyatt feels that most voluntary organizations need to get to the level that Camrose is at. "Technology is now a must have. Voluntary organizations need to access and record information faster than ever. They also have funders insisting that they submit proposals electronically. In this environment, all funders have a responsibility to raise the bar in terms of technology capacity for the organizations they fund."

United Way of Halifax Region

United Way of Halifax Region is one of the 125 members of [United Way Canada-Centraide Canada](#) across the country.

With a strong track record of funding technology, staff at the Halifax United Way understand that computers and Internet access are essential for most modern voluntary organizations. Director of Community Resources Peter Mortimer says: "These are tools that every organization needs to do its business these days. It is as simple as that."

What's interesting is that the Halifax United Way hasn't always been so open minded about technology. In the early 1990s, it placed strict restrictions on purchases of capital equipment, which included computers. As a result, agencies were not able to use United Way funds to put computer infrastructure in place.

This changed in the mid-1990s as a part of an overall funding policy overhaul. At that time, the Halifax United Way moved towards a more flexible funding scheme that put more decision making into the hands of the agencies it funded. Funding was allocated to a particular program, with agencies having the option to spend the money on whatever was needed to make the program work, including technology. At the same time, the restriction on capital purchases like computers was removed.

Nowadays, the Halifax United Way regularly sees its funding applied to purchasing computers, Internet access and web site services. According to Mortimer, these investments have done more than just make organizations more efficient. "In some cases, we see technology changing the way that organizations work for the better. For example, one organization has increased its contact with the community it serves by opening up a public Internet access site. This has made their open door policy a reality."

Mortimer believes that funders have a role to play as technology catalysts, showing the strategic potential of tools like the Internet in subtle ways. "Instead of photocopying research reports for our agencies, I send them the web site links. As a result, they end up stumbling across way more than just the material I sent them. This leads to new ideas and new ways of thinking." If Mortimer is to be taken as an example, there is clearly more to technology funding than money.

The Maytree Foundation

The Maytree Foundation seeks to accomplish its objectives by identifying, supporting and funding ideas, leaders and leading organizations that have the capacity to make change and advance the common good.   It provides capacity building grants to organizations, and will consider funding applications that include technology supports as part of the overall programming objectives.

Maytree is a committed supporter of capacity building and although resistant to funding capital components, will consider strategic investments in technology, as part of strengthening an agency's ability to:

- Further participation of refugees and immigrants in Canadian society
- Improve governance, provide more sustainable organizational management and increase community responsiveness

In partnership with two other funders (the United Way and the Ontario Trillium Foundation), Maytree has committed to a three-year collaboration to design a self-assessment tool for organizations that looks at best practices in program delivery. Part of that self-assessment will examine how organizations are using technology in support of their missions. Maytree's interest in this collaboration is in building stronger, more efficient organizations that integrate investments in technology (as well as other capital and professional development improvements) in their overall missions, becoming better positioned to make the policy changes they seek.

The George Cedric Metcalf Foundation

The George Cedric Metcalf Foundation has a long-standing interest in building the capacity of the not-for-profit sector, offering support for capacity building initiatives through each of its three programs. This includes capacity building at the individual, organizational and sector-wide levels. Recognizing the important role technology plays in building effective organizations and in helping to advance its overarching programmatic goals, the Metcalf Foundation is willing to, and interested in, supporting its grantees in technology investments.

In launching its Environment Program in 2002, Metcalf identified capacity building as a central component aiming to "assist environmental groups to increase the breadth and depth of their work." One of the elements of this program was a "small grants window to support small projects. This could include basic communications infrastructure such as fax machines and computers, specific training opportunities, or small-scale technical support such as web design." It was intended to provide quick turn-around on small grants, the amount of which would be specified by the applicant. Surprisingly, there was no uptake on this element of the overall Environment Program.

The Foundation could not identify one specific reason that the program was not embraced by grantees, although they did suggest some possible reasons: competing organizational priorities; the chance of securing larger grants by applying for a "bigger pot;" and/or lack of awareness of

the small grants window. With this experience in hand, and through an overall reassessment of the Foundation's approach to all aspects of the capacity building program, this particular funding stream was eliminated as a stand-alone, and was instead integrated into the other program streams, namely Southern Landscapes and Northern Forests. The Foundation was then identifying technology and communications support as an approach to funding, or a lens through which they look at organizational support, as opposed to a separate program. The Foundation has taken a more strategic, and integrated approach to technology support, and understands that this element of capacity building fundamentally serves overall mission work of its grantees, and the Foundation itself.

As an example, from its current guidelines for the Southern Landscapes program, "the Foundation will also consider supporting a number of organizations for a three-year period, as they undertake strategic initiatives to increase the breadth and depth of their work in southern landscapes. This is neither operating nor project funding, as this concept is traditionally understood. This capacity building funding is intended to help organizations to either seize new opportunities, or address chronic problems or limitations in their efforts to maintain biodiversity along the country's southern border. It is the Foundation's intention that over three years, organizations will be able to implement a strategic course of action which would not be possible under normal budgetary circumstances." Support for technology applications that will advance the strategic goals of grantees will be included in these three-year grants.

For instance, a recent grant to the Conservation Council of New Brunswick (CCNB) included a significant focus on technology. CCNB proposed a three-year campaign to significantly "broaden its overall support through building its membership base and to increase its public outreach efforts." While key components of the proposed plan included enhanced communications, outreach and staff training, the organization understood from the outset that their success would also hinge on infrastructure support. "The chronic … limitation means that the Council has not been able to acquire or fully utilize the tools available for internal and external communications and for streamlining efficiency of the staff's work." Upon receiving the grant, CCNB hired an Information Technology Coordinator who purchased equipment, upgraded office technology, launched an EcoMail tool for communicating with members, developed data and inventory storage protocols, and provided informal training to staff and board members as well as volunteers. Future plans include website development, integrating GIS capacity, and additional staff and board technology-based training to mention just a few. This three-year capacity building grant "is required to … help ensure that Conservation Council staff and board members have the training, tools, experience and support to carry on and achieve the biodiversity policy change and education goals they are currently working towards."

The Ontario Trillium Foundation

The Ontario Trillium Foundation, an agency of the Ministry of Culture, receives annually $100 million of government funding generated through Ontario's charity casino initiative. As one of Canada's leading grantmaking foundations, the Ontario Trillium Foundation works with others to make strategic investments that build healthy, caring and economically strong communities in Ontario. It provides three types of grants:

- **Operating Grants** for ongoing program and administration costs over a limited period of time, up to five years
- **Project Grants** for an initiative that has a definite beginning and end, and that may be in addition to a group's regular work
- **Capital Grants** for making repairs, renovations or improvements to lands and buildings, or for buying equipment that will have a direct effect on a group's programs or activities.

All OTF granting has at its base this concern: strengthening the communities in which the program activities of the grantee organization take place. OTF supports funding applications that include the strategic use of technology to help build strong communities, and is willing to invest in capacity building across the sector. It is particularly interested in helping prospective grantees think about new ways to deliver services and in asking for OTF support for programs and ideas that haven't been funded before.

OTF will make grants for capital purchases, including technology, and will also consider technology purchases as part of operating and project grants. An example of innovative grantmaking of OTF is the Canadian Partnership for Children's Health and the Environment: OTF provided funding for the information-sharing network, the CPCHE portal, the Secretariat, a provincial workshop strategy, and, a communications and health promotion strategy.

Related resources:

- *Beyond the Box: Thinking strategically about technology grantmaking in Canada's voluntary sector* (2004). A discussion paper funded by the Government of Canada's Voluntary Sector Initiative, Changing Funding Practices Project. Identifies ways for Canadian funding agencies to work with each other and with the voluntary sector to make technology funding more effective. http://www.vsi-isbc.ca/eng/imit/pdf/beyond_the_box.pdf

- *From Obstacles to Opportunities: six interlocking elements of Strategic Technology Grantmaking* (2003). Funded by the WK Kellogg Foundation, this report represents the only comprehensive study of technology grantmaking issues. It is based on extensive interviews with US grantmakers and technology support consultants. It includes both a solid analysis of the issues and a practical framework aimed at improving the capacity of grantmakers to deal with technology requests. Written by Marc Osten, Jillaine Smith and Rob Stuart. Available online at: http://www.uploads.nten.org/gems/reportkellogglinks030703.pdf

- *Ready for an Upgrade? Is Technology Funding a New Frontier for Philanthropy?* Sylvia Lindman (2002). This article published by the Minnesota Council on Foundation highlights technology funding policies, attitudes and approaches in Minnesota. View this article online at: http://www.mcf.org/mcf/forum/readyforanupgrade.htm

3. What is the bottom line for basic tech capacity?

Objective: Help not-for-profit managers and funders assess whether basic technology tools and skills are in place in an organization.

For most people, it is hard to answer the question: 'Is the technology foundation of this organization a sound one?' This chapter of the toolkit provides a simple set of five probes aimed at helping not-for-profit managers and funders to answer this question. Grantmakers can use these probes when reviewing proposals with a technology component to determine whether the VSO has the basics already in place. Managers can use these probes to do a quick assessment of the technology capacity of their organization. The five probe questions are:

1. Does the organization have a technology plan?

2. How frequently does the organization back up data?

3. Does the organization have a high speed Internet connection shared by all staff?

4. Does the organization have a process to ensure that database content is kept current?

5. Can all necessary staff update and add content to your organization's web site? How?

These questions should be seen as probative, not prescriptive – they are just meant to provide a snapshot of technology capacity. Notes on interpreting – and responding to – each of these questions is provided below.

> ***1. Does the organization have a plan to maintain, replace and add technology infrastructure? Does it use budgeting tools like 'Total Cost of Ownership' to ensure resources are in place for future technology upgrades?***

Many funders and organizations don't think past the initial purchase and installation of computers. All organizations need some kind of technology plan to maintain a stable, up-to-date technology infrastructure for its staff and volunteers. Budgeting for future upgrades is especially key here.

If there is no budget in place, it is likely that the organization is dealing with technology in an ad-hoc manner and that there are weaknesses in its core infrastructure. Ideally, tech budgeting should be dealt with using a Total Cost of Ownership (TCO) approach that accounts not just for hardware but also software, network connections, training and support. TCO can be calculated in many ways. Some organizations simply allocate 2-3% of their total budget for the total cost of technology; others assume $250 per month per workstation to cover technology costs, while other organizations calculate quite accurate budgets for their technology needs.

The lack of a technology plan and budget may also point to the fact that the organization does not have qualified internal staff or outside contractors who have been assigned to deal with technology support issues. Many voluntary organizations rely solely on 'accidental techies' – counsellors, program staff and even executive directors who end up doing all the organization's tech work simply because they know how. This can be dangerous, both because these people may

not have big-picture tech skills and because tech work usually distracts from the core work these people have been hired to do. If an organization is using accidental techies, it should make sure they have time set aside for this work and should offer them training on topics like tech planning and budgeting.

If an organization does not have a technology plan or budget, it is worthwhile to encourage them to develop these documents. This will ensure that they have the resources in place to keep their systems up and replace them over time. Planning tips and templates are included later in this document.

2. How frequently does the organization back up data? Does the organization store copies of backups offsite? How often does the organization test its backups by restoring data?

Backups of key organizational data – documents, databases, e-mail archives – are an essential part of an overall security and disaster prevention strategy.

All organizations should do some kind of automated backup on a regular basis, with tapes or CD ROM copies of the backup kept offsite at a safe location. While the frequency of the backup depends upon how often critical information is updated, a good rule is to do weekly backups. Backups should be regularly tested by restoring data to see if the backups are working correctly. If you haven't tested your backups, assume that they won't work. If they are not stored offsite, assume that your organization will have a flood or break-in and you will lose your data.

The existence of a good backup regime most likely indicates that other security and disaster recovery mechanisms are in place. Organizations with sound disaster recovery plans can get back on their feet quickly after a systems failure or virus attack. Organizations without backups and associated systems can be down for weeks – or even months – if they become the target of a hacker or virus.

Also, a lack of security and disaster recovery strategies often points to a lack of technology planning and qualified technical staff. For example, the use of firewalls that deter hackers and up-to-date virus protection software are essential for protecting data and your clients' privacy. Organizations that do not deal with disaster recovery well should be encouraged to develop a technology infrastructure plan and to ensure that proper staff or consulting resources are in place to deal with technology support issues.

3. Does the organization have a high speed Internet connection that all staff can use concurrently?

The existence – or lack – of a high speed Internet connection reveals many things about an organization's technology capacity.

At a base level, it shows that a local area network is in place (staff and volunteers can collaborate inside the office) and that all computers have Internet access (staff and volunteers can conduct research and collaborate with the outside world).

In most cases, it also demonstrates at least some level of technical sophistication and planning at the management level. The benefits of high speed Internet easily out-weigh the costs in most

urban locations. Organizations that hang on to dial up accounts are often demonstrating a "penny-wise, pound foolish" attitude to technology. This can be a red flag that an organization needs significant technology planning assistance.

In order to encourage 'efficiency thinking', grantmakers should be open to cover the cost of services like high speed Internet access, even if it is a few dollars more than dial up.

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4. *Does the organization have a process to ensure all contact information in its databases is kept current?*

For most voluntary organizations, relationships are amongst their most valuable assets. More and more organizations use a database to track these relationships and manage communication with clients, donors, volunteers and partners.

An organization's 'information update process' indicates a number of things. Obviously, it reveals whether or not an organization is committed to maintaining the quality of its data. If there is a process in place for updating contact information, it is likely that the organization has good quality data. If there is not a process in place, it is almost guaranteed that the database is out of date, which makes it less and less valuable as an organizational asset.

Asking about the updating process may also reveal how accessible a database is within an organization. Easy updating of a database usually requires that all relevant staff have direct access to the database. This means delivering the database over a local area network (a LAN is in place) or over a secure web connection (a high speed Internet connection is in place). It also means distributing control over the database throughout the organization. The lack of a good system for updating may indicate that an organization is unnecessarily hoarding control of information systems at the management or administration levels of an organization. This in turn may mean that technology investments are not being used effectively to support the work of staff and volunteers across the organization.

The answers to this probe are especially important if an organization is seeking support for a large strategic technology project. If an organization does not have good procedures in this area, it most likely does not have the planning and management capabilities necessary to take a major strategic project forward. The organization should be encouraged to develop a detailed strategic tech plan for their project, possibly with the help of an outside consultant.

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5. *Can all necessary staff update and add content to your organization's web site? How?*

Web sites are of increasing importance for almost all voluntary organizations. Depending on the organization, they can help with key tasks like handling basic inquiries and referrals, recruiting new members, disseminating research and reports and providing a channel for remote service delivery.

As web sites become more important, it is essential that key staff and volunteers throughout the organization have the ability to add and edit content to the sections of the web site for which they are responsible. This can happen in a number of ways – close cooperation with a webmaster, technical training for non-technical staff or creation of an automated 'content management system' that allows non-technical users to easily post content using a web form.

A well-designed process allows staff to update a web site. This is an indicator that an organization is taking a strategic approach to technology. It shows that the organizational leadership understands that the web site exists to support the strategic and programmatic goals of an organization – and that the people who do strategic and program work need to drive the web site. Organizations without a sound approach to distributed web site updating may be focusing too much on the technology aspects of the web, and therefore leaving control over all aspects of the web site with technical people.

This line of questioning can also reveal information about the technical sophistication of an organization. If an organization has a database-driven content management system in place to allow staff to update their site, this most likely reveals that they see the value of automating time-consuming technical work. It is also a likely indicator that an organization has strong strategic technology planning and budgeting capabilities.

> ***Related resources:***
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> - ***Technology Literacy Benchmarks for Voluntary sector organization Organizations*** Benton Foundation and NPower (2002). This article uses benchmarking as a way to help non-profits evaluate their use of technology. Each benchmark provides an example of how technology literate organizations integrate technology into their daily work. View online at: http://www.npower.org/tools/benchmarks6.02.pdf

4. What should technology basics cost?

Objective: Give not-for-profit managers and funders simple tools that will help them estimate how much an organization should be spending on technology basics.

For many people, the idea of coming up with a technology budget is an intimidating one. This needn't be the case. This chapter of the Toolkit provides not-for-profit managers and grantmakers with tools that make technology budgeting easy. In particular, it focuses on the idea of 'total cost of ownership' (TCO) – an approach that helps with budget technology basics. TCO is simply a way of estimating what it actually costs to install, operate and maintain a computer system, as opposed to just the purchase price of the computer.

Why Total Cost of Ownership?

TCO is not new – business and government have been using it since the 1980s. It's a tried and true method for understanding the total cost of an investment in technology. Knowing your TCO allows an organization to budget effectively for the real and actual costs of using technology. Additional benefits include:

- Adds predictability and ensures a more realistic budget
- Supports accurate budgeting for ongoing technology training for staff
- Ensures the maximum return on technology investments by planning for maintenance and upgrades
- Decreases emergency and ad-hoc purchases

Understanding TCO is not complicated. In fact, it can be as simple as counting up the number of computers that are needed in your organization.

How much should technology cost?

There are a variety of ways to budget for an organization's ongoing technology costs.

The easiest is to assume a monthly expense of $250 per computer workstation per month when developing an annual technology budget. This figure of $250 is widely accepted in the voluntary sector as a reasonable "support and maintenance" amount.

Another widely accepted way to budget for the ongoing costs of having an office that uses technology is to assume a cost of two to three percent of the annual budget for maintaining and upgrading technology.

Finally, the most accurate way to plan for the technology needs within an organization is to develop a technology budget, just as one would develop a program budget or administration budget.

What's included in Total Cost of Ownership?

If your organization decides that it should do its own TCO calculations, it should consider the following factors:

Category: **Hardware**
Direct Costs: Upfront equipment cost, service contracts
Indirect Costs: Upgrades, support cost; Documentation time in a network notebook
Considerations: Donated computers are NOT 'free', proceed with caution! Having many different types/models will cost more in direct and indirect costs.

Category: **Software**
Direct Costs: Upfront Software Costs
Indirect Costs: Customization costs; Documentation costs
Considerations: Is it cheaper to "rent" software through an ASP? The more software titles you have, the more training you need and the harder it is to keep up with it all.

Category: **Training**
Direct Costs: Initial Training Costs. Money spent on computer books
Indirect Costs: Staff time for training. Staff time for future ongoing trainings to account for turnover.
Considerations: Businesses typically have one internal IT staff person for every 50-75 users. Voluntary sector organizations usually only have one IT staff person for every 100- 150 users (not enough!). Highly specialized database applications often require their own support contracts or resources.

Category: **Networking and Connectivity**
Direct Costs: Cost for wires and the installation
Considerations: Wireless technology can reduce the overall cost of an installation

With all equipment, it is important to consider depreciation. Depreciation is the process of allocating the cost of an asset over its expected life. When budgeting for technology costs, this means spreading out the cost of computer hardware across several years. It is a common standard to fully depreciate hardware over three years, so plan for complete replacement costs each three years. A longer depreciation schedule means you are falsely valuing what is now a (financially) worthless asset.

> *Related resources:*
>
> - *The real costs of technology: what agencies and funders should be paying for computers* Gillian Kerr (2002). Charity Village article providing a good overview of total cost of ownership and budgeting issues.
> http://www.charityvillage.com/cv/research/rtech19.html

5. Strategic technology plans for organizations

Objective: Give not-for-profit managers a practical framework for developing a strategic technology plan for their organization. Help funders understand what to look for in a technology plan.

Measure twice, cut once

Given the importance of technology in today's not-for-profit organizations, it is surprising that technology planning is not more common. A technology plan helps organizations identify their organizational communications needs, map appropriate technology tools onto those needs, and identify the resources they will need to transform vision into reality. In addition, a well-written technology plan helps organizations clearly communicate their technology needs to foundations, donors and the consultants or intermediary organizations that will help them fund and implement their technology vision.

Planning technology projects may seem intimidating at first, but the process is quite similar to other voluntary sector program planning processes. Successful technology plans will generally contain the following elements:

- A broad statement mapping technology needs against an organization's overall strategic plan
- An assessment of the organization's current situation
- A description of needs and strategies in main areas of technology activity – basic infrastructure, technical support and training, web and online, strategic tech projects
- Estimates of the resources required to maintain basic systems and support, and implement strategic tech initiatives

A strategic technology plan is not a "cookbook," documenting every detail of implementation. Technology changes quickly. The amount of time necessary to research and write down-to-the-part-number detailed technology plans often makes these plans obsolete by the time the organization is ready to implement them. We recommend keeping the plan as simple as possible, using it as a guide and framework for regular technology decision making rather than a prescriptive roadmap.

What's provided below is a description of what should go into a simple organizational technology plan. Links to more complex and comprehensive planning frameworks are included at the end of this chapter for organizations that believe they need more than a simple plan.

Note: A template for writing an organizational technology plan is available on the IMPACS website, and will also be posted on the VSI website. See:
http://www.impacs.org/index.cfm?group_ID=2932

Connecting up to your strategic plan

As a starting point, a technology plan should look at the technology implications of an organization's overall strategic or program plan.

Obviously, an organization needs basic technology infrastructure in place in order to function. But what technology systems and support are required beyond this? An easy way to find out is to write out a list of major goals and objectives from your strategic plan and then ask: could technology help with this? This table provides an example of what you might write out:

Goals from strat plan	*Technology related goals*
Improve service to clients by making it easier for staff in all program areas to work together on client cases	Upgrade organizational database systems so that they can be used as an integrated case-management system across all program areas
Increase number of past clients that stay connected to the organization as donors or volunteers	Create monthly e-newsletter that informs past clients of happenings and volunteer opportunities in our organization
And so on ...	

As this information will provide a framework that will guide you as you fill in other sections of the plan, it is worth broadly consulting with others to gather input on connections between your strategic plan and technology systems. Board members, people from critical program areas, people from satellite offices, volunteers, consultants and program recipients may all have something to offer here.

Technology assessment

A technology plan should also include information about the current state of an organization's technology. A simple way to prepare this sort of assessment is to run through the 'probes' outlined above in section three of this document:

- How frequently does the organization back up data?

- Does the organization have a high speed Internet connection shared by all staff?

- Does the organization have a process to ensure that database content is kept current?

- Can all necessary staff update and add content to your organization's web site? How?

Other questions that you may also want to ask include...

- Does the organization have anti-virus software installed on all computers that is automatically updated?

- Does the organization have someone on staff or a paid consultant who performs regular maintenance on the technical infrastructure of the organization?

- What technology training is made available to staff and volunteers?

The answers to these questions will help to identify areas of strength as well as technology gaps. The plan itself should detail these strong points and gaps, with the idea that other sections of the plan will be focused on filling gaps.

Basic infrastructure

A technology plan should include information enumerating an organization's everyday infrastructure needs – reliable computers, networks, software and support. These systems comprise the 'communications plumbing' that is as essential to an organization's smooth functioning as telephones, copiers and fax machines.

Focused around issues like number of staff and office locations, an infrastructure plan should answer questions like:

- How many staff need full-time computer access? How many additional computers are needed for part-time staff and volunteer computer access?

- How many existing computers are more than three years old? More than two years old?

- How many locations does the organization have? Do all locations have a LAN, a printer and high speed Internet access?

- Are there areas where software upgrades and replacements are needed?

- What is the plan for providing technical support for staff and volunteers?

The main purpose of an infrastructure plan is to help an organization determine how much to budget for maintaining and upgrading its basic technology infrastructure (see later in this chapter). The information collected and gleaned from this level of planning is critical in annual budgeting and can be incorporated into fundraising proposals.

Basic technology infrastructure plans also help organizations think proactively about upgrading and replacing their technology systems *before* costly and disruptive meltdowns occur. As a rule, computers and the software they run should be replaced every three years.

Training and support

Technology systems are only effective to the degree that voluntary sector staff know how to use them to maximum advantage. Voluntary sector organizations tend to chronically under-invest in developing the technology skills of their staff members. The best way to reverse this pattern is to

document training needs and then to allocate the budget necessary to address these needs. With this in mind, the training section of your plan should address challenges like:

- Providing ongoing training to deal with turnover of staff and volunteers.

- Defining baseline technology skill sets and a method for ensuring that relevant staff and volunteers have these skills.

- Creating a process for writing technology training objectives into staff members' personal development plans or other annual planning/evaluation processes.

- Accommodating different learning styles by offering access to different kinds of training – mentoring, mini-classes, formal classroom training, self-paced online training. Most kinds of training can be found from outside training providers, which keep costs low and quality high.

- Promoting just-in-time learning by keeping a collection of up to date reference books and offering staff and volunteers a collection of technical support bookmarks that provide useful reference material.

It is important to remember that all training takes time and money. Training costs should be included in the technology plan budget, either as a standalone item or as a part of the TCO calculation.

Web and online

Most voluntary organizations now use web sites and other online tools to communicate with clients, volunteers and others. A technology plan should articulate both the baseline functions that the web site has and future plans for upgrades and promotion. Specific questions to answer include:

- Who does the organization's web site serve? What information and services are they seeking on the web site?

- What are the baseline functions needed to meet the needs of these audiences (e.g. a calendar of workshop dates or an e-newsletter)?

- What new features and functions need to be added to the web site in order to meet objectives outlined in the strategic tech goals section of the plan?

- What methods are used to regularly market and promote the web site?

Unlike infrastructure and training, the budget for an organization's web site should NOT be included as a part of TCO. Online communications should have its own line item (and possibly a number of sub line items) in the technology plan budget. The web site budget should include money for hosting, a webmaster (even if part-time), upgrades and marketing.

Strategic tech projects

As outlined in the next chapter of this toolkit, strategic technology projects such as a new online service for clients or a campaign to recruit more members online, should have their own technology plan and budget. This said, it is worthwhile to mention these projects in an organizations overall tech plan. All that is really needed is a short bullet list or table listing the strategic tech projects that are planned. High level budgets for these projects should also be included in the overall technology plan budget.

Budgeting and action planning

A technology plan should conclude with budget and action planning sections. The budget need not be complex. At the most basic level, a simple budget needs to include:

- Yearly infrastructure and training budget based on TCO calculation (e.g. number of workstations x $250/month x 12).

- Yearly web site budget including hosting, webmaster, upgrades and marketing.

- Rough budget estimates for any strategic technology projects that are planned.

In addition to the budget, a rough action plan outlining major milestones and deadlines should be included in the plan. This action plan can be used by managers and board members to check in on progress against the action plan.

Making it happen

As the information above indicates, creating a technology plan need not be a complex affair. It is just a matter of asking the right questions about your organization's tech needs, documenting the answers and making the appropriate budget allocations. Ideally, this process should be done every two to three years, with the plan working as a rough framework for technology decision making during the period that it is in place. The easiest way to deal with renewing a technology plan is to tie it into your organization's regular strategic planning cycle.

Related resources:

- ***MITW Partnership Platform*** – Designed to help organizations develop requests for corporate partners, this technology assessment tool can also be useful for organizations looking to do a general tech strategy review or prepare for a technology grant proposal.
  http://www.volunteersonline.ca/modules.php?name=Profile&op=addProfile

- ***TechSurveyor*** - TechSurveyor is a free online tool to help you capture a snapshot of your network setup, computer hardware and software, peripheral details and internet essentials. http://techsurveyor.npower.org/techsurveyor/

- ***Summit Tech Planning Toolkit*** - Tips and resources from the Summit Collaborative's workshops and programs
  http://www.summitcollaborative.com/cwpm.html

6. Planning for strategic tech projects

Objective: Give not-for-profit managers a practical framework for developing a strategic technology project plan. Help funders understand what to look for in a proposal or plan of this nature.

A strategic technology project uses computers or the Internet to help address a specific organizational problem or community need. For example, an organization might decide that the best way to improve service to clients is to increase cooperation between different program areas. In order to facilitate this, a single client database shared across the whole organization is needed. Similarly, an organization could be grappling with the fact that it is having a tough time attracting younger volunteers. In response, it has decided that it should increase its use of the Internet because there is evidence that the best medium for reaching youth is the Internet. Both of these are examples of strategic technology projects.

As with any major organizational initiative, strategic technology projects need a sound plan. A plan serves a number of different purposes – documenting the project vision and objectives, generating consensus amongst stakeholders, defining a technical approach, working out a budget. A strategic technology project plan also provides the raw material for funding proposals. In fact, a good plan can often serve as the main body of a grant proposal submission for projects like this.

As with organizational tech plans, the idea with a project plan is not to carve every detail in stone. Rather, the aim is to sketch out the overall goals and general approaches that will guide the project as it is implemented. What follows is an outline of the typical materials and sections that might be included in a strategic technology project plan.

Note: A template for writing an organizational technology plan is available on the IMPACS website, and will also be posted on the VSI website. See:
http://www.impacs.org/index.cfm?group_ID=2932.

Vision statement

A strategic technology plan should start with a big picture overview of what the project will produce (outputs or deliverables) and a list of the community or organizational impacts that it aims to have (outcomes). The following three sections might be included in the opening segment of the plan:

- **Vision:** A one paragraph description that describes the essence of the project. *E.g. This project will use the web and e-mail to increase the number of youth we are able to engage as volunteers.*

- **Project deliverables:** A list of things that will be produced through the project – a web site, an online calendar, a database, e-mail lists, a collaborative online event. Each item in the list should include an annotation or description so that readers can understand what each of the deliverables will be used for.

- **Anticipated outcomes:** A list of measurable objectives or community outcomes that will be achieved through the project. *E.g. Increase the number of youth volunteers by 25% in year one and 100% in year two.*

By the end of this section, the reader should have a clear picture of what will exist by the time the project ends and who will benefit from the project.

Needs assessment

As with any initiative, a strategic technology project should be based on concrete, demonstrable needs. The needs assessment section of your plan should include:

- **Community profile:** A brief description of who will benefit from your project. This may include: the community at large; clients your organization serves directly; or staff or volunteers.

- **Statement of need:** A list of specific needs or desires that the beneficiaries have. *E.g. Young volunteers need ways to contribute in a manner that fits better into their work and social patterns. Online virtual volunteering may help with this.*

- **Research summary:** A summary of the research that you did in order to develop your statement of need. This could include research that you did yourself (e.g. focus groups or online surveys) or research done by others (e.g. published studies and reports).

This information should act as a bridge between your vision and your project description by providing evidence that your approach is grounded in an understanding of community needs.

Project description

Building on the vision and needs assessment, a rough picture of how the project will be implemented should be included in the plan – the services to be built, the technology used, the people involved. Likely content for this section of the plan includes:

- **Functions and services:** An overview of what will be built, written or otherwise created by the project team. Examples include: web site or other technology functions; training sessions; community development efforts; new or edited electronic content.

- **Technology approach:** A description of the types of technology that will be used. This could be quite specific (e.g. the new online database will be built on top of our existing PHP and MySQL system) or just provide general principles (e.g. all tools used to develop this project should be open source).

- **Delivery approach:** Information about how the project will be delivered. This should include: staffing roles; project management approach; project governance; list of partners and partner roles.

- **Marketing strategy:** An overview of messages and techniques that will be used to market the project. Marketing should be thought of quite broadly as the process of letting people know about the initiative and getting them to use the systems put in place.

The material in this section will both act as a useful reference for the people implementing the project and will guide the development of an action plan and budget.

Action plan and budget

The plan should end off with an action plan and budget. For simpler projects, these two items can be combined into a single table something like this one:

Name	Task	Due by	Budget
Jim	Interview clients about their needs	February	Two weeks of Jim's time ($2000)
Eleanor	Research and interview technology vendors	March	One week of Eleanor's time ($1000)
Contractor	Build web site	April	$15,000
Eleanor	Manage contractors	April	One week of Eleanor's time ($1000)
Alice	Promote web site to clients	May	Two weeks of Alice's time ($2000)
Total			$21,000

Of course, a much more detailed action plan and budget is needed for larger projects. In these cases, the action plan and budget should be separate documents.

Related resources:

- ***Funding for Technology*** (2003) An excellent overview of issues to consider when writing grant proposals for technology projects. Includes links to tech grant writing worksheets.
  http://www.dotorgmedia.org/Publications/Publications.cfm?ID=78&c=20

7. Tips for smart technology grant seeking … and making

Objective: Provide grantseekers and grantmakers with tips to guide the process of dealing with technology grants.

As outlined previously in this toolkit, using technology effectively is mostly about thinking strategically and investing a bit of time in planning. Seeking – and making – grants for technology should just be an extension of these same principles. The following is a list of tips intended to guide grantseekers and grantmakers as they think through technology funding issues.

Funding technology basics

Basic technology infrastructure is now a 'must have' in the voluntary sector. The following tips speak to how to handle funding for tech basics:

	Grantseekers	*Grantmakers*
Technology plans	Prepare a technology plan, and update it regularly. This will show funders that you know what you are doing and will back up your budget requests.	Ask to see an organizations tech plan to ensure they have basic tech capacity in place. If an organization doesn't have a plan, point organizations to planning resources like this guide.
Computers and Internet access	Include computers and Internet access in all project budgets, just as you would with other overhead like office space and telephones. Use TCO to come up with comprehensive and justifiable numbers for your tech costs	Accept that technology is a cost of doing business. Fund technology line items using the same rules you use to fund other kinds of overhead. If your funding policies treat computers as capital expenses, change your policies. Computers are an operating expense incurred by all modern not-for-profit organizations.
Upgrades and training	As above, use TCO and ask for tech in all your grant requests. TCO should include your training and upgrade costs.	
Web sites	Tie major web site upgrades and campaigns to your broader strategic plan ... and then include web site costs in funding proposals related to the strategic projects or programs that your organization is undertaking.	Look to see how web investments are tied to other project or program goals that you are funding. If there is a link, treat the web site costs like any other cost related to delivering a project or program.

Funding strategic technology projects

Voluntary organizations have the opportunity to use technology strategically to enhance and extend their ability to serve their communities. The following tips are intended to help voluntary organizations and funders think through funding for strategic technology projects.

	Grantseekers	*Grantmakers*
Think community, not technology	Strategic technology projects are focused on providing a service to your community – the technology is just a means to an end. Make sure that the community service is the focus of your project proposal.	Watch out for 'tech for the sake of tech' projects. Encourage grantees to spend most of their effort describing the community service they plan to offer, with only minimal effort going into describing the tech they will use.
Define clear needs and objectives	As with any kind of project, you should include clear information about the community needs you plan to address and the objectives that you plan to meet through your projects. Then, link these needs and objectives to the technology you plan to use.	A technology project is just like any other – it needs to be grounded in concrete community needs and framed in terms of tangible, measurable objectives. If you don't see the link between the needs and objectives outlined and the technology proposed, ask the grantee to make the link clearer.
Don't limit yourself to 'technology grants'	Don't limit yourself to 'technology grants' when looking to fund a project with a significant strategic technology component. Funders should be willing to fund technology through their other programs as long as the community benefit you are providing fits their program guidelines.	Be open to funding technology projects in all of your program areas. The main test should be whether the project objectives match up with your program focus and criteria.

Application Processes

As technology becomes more accessible (and pervasive) for grantmakers and grantseekers alike, many funders are moving to online application processes. There are upsides and downsides to this trend, as discussed in the following article. One of the upsides is that grantseekers can cut and paste boilerplates they might already have, directly into grant applications, rather than the time-consuming task of rewriting for each new application. Electronic submission also cuts down on costs, like the expense of couriering a grant application to meet a deadline.

A downside is that online applications, because of their ease and speed, may invite otherwise non-qualified applicants to simply email in an application, without considering the "fit" with the grantmakers objectives. Just as happens with inexperienced grantseekers deluging grantmakers with boilerplate hardcopy applications, online application processes may increase the workload for grantmakers, resulting in long processing times or the need for more grantmakers to request "letters of inquiry" or invited applications only.

The caution then to grantseekers who are set up to use online application processes: for the benefit of all, make sure you fit the grantmakers eligibility requirements before you submit an online application. Enjoy the advantages that online application processes can bring, without allowing their ease to encourage you to lose sight of the overall goal of the grant writing process: to produce relevant, tightly-focused strategic technology grant applications that encourage grantmakers to fund your work.

Related resources:

- *Funding for Technology* (2003). An excellent overview of issues to consider when writing grant proposals for technology projects. Includes links to tech grant writing worksheets.
  http://www.dotorgmedia.org/Publications/Publications.cfm?ID=78&c=20

- *Core Themes Related to Grant Seeking and Technology* (2003). An informative discussion of issues related to funding technology from a grantmakers perspective.
  http://www.techsoup.org/howto/articlepage.cfm?ArticleId=497

- *Writing a Winning Grant Proposal* (2003). Clear and practical advice about how to assess and prepare a powerful case for funding technology, and craft an effective grant proposal.
  http://www.techsoup.org/howto/articlepage.cfm?ArticleId=504

8. Choosing the right consultant

Objective: *Provide tips on what to look for in a technology consultant.*

Should your organization decide to use a consultant for a project, it might be tempting to hire the first one you hear about. After all, who has time to interview an endless list of candidates? But the first consultant who offers to help you is not necessarily the best choice. Would you trust the first shoe salesperson who says she or he has just your style?

Finding a consultant you have a good working relationship with is crucial. You are going to be investing significant time and money in this; it's best to shop around and interview several candidates.

An in-person interview is the best way to find out if the consultant is someone you want to work with. But if you have only a small, well-defined project, a phone interview may be enough.

Things to find out in the interview:

Does the consultant's technical experience match your needs?
Does the consultant understand the hardware, operating system, and software that your organization uses or is likely to use? Has the consultant worked on similar projects before? Look at the consultant's educational background and work history.

Does the consultant understand how voluntary sector organizations work?
A consultant who has experience working with voluntary sector organizations is always preferable, but VSO technical consultants can be hard to find. If you use consultants who work mainly with businesses, make sure they understand the voluntary sector. It helps to make sure that consultants understand your organization's specific mission as well. Do they know why the technical project is important to you and what you need to be able to use the technology for? If the work involves discussion and negotiation, make sure the consultant's values are compatible with yours and with what is needed to do the job well.

How well does their solution fit?
Talk through your needs as you see them. Ask them what solution they would propose. Ask them to articulate how the solution would address your needs and to justify why the solution they chose will be the best.

Do they explain things in a way you can understand?
Consultants who make fancy speeches about what you need and use jargon you don't understand are not doing their job. You should never listen silently and feel ignorant when consultants use technical terms. Ask them to explain what they mean. Do they clarify what you need to understand, so you can see how it will impact your work? Do you feel comfortable asking 'dumb' questions?

Are they trying to push one specific product?
Some consultants have a special relationship with certain vendors, and will recommend that vendor's products even if they are not what your organization needs. Others may recommend

something simply because they are more familiar with it. Make sure the consultant does not represent any software or hardware companies.

How busy is the consultant?
Can the consultant commit to finishing the project in the time frame you want?

Is the consultant clear about the responsibilities of the project?
Ask consultants to articulate what their role will be and what specific tasks they will have to accomplish. Find out how busy they will be with other things while they work on your project. The best way to find out how much they have thought it through is to request a proposed work plan from them.

What fee structure does the consultant use?
Some consultants charge by the hour and some charge for the whole project. Is the consultant willing to break the project down into stages, with an estimated fee for each stage? Watch out for pat answers about how much things will cost. For instance, a consultant who always charges the same to make websites probably makes them according to a formula. That structure may not be what you want or need.

The bottom line, of course, is whether you can afford their rates or get them to negotiate a lower price if you can't. If the interview gives you a good impression, it's still best to check the consultant's references carefully. CompassPoint Voluntary Sector Organization Services offers a great article on checking references. See: http://www.ontap.org/advice.html#interview.

Request a Work Plan or Proposal

The final step in making a decision about a consultant is to see a concrete proposal for the project. You can ask bidding consultants to develop a work plan for the project. Then, you can incorporate the work plan into the contract you write for the consultant you hire. If the consultant comes up with a work plan that is extremely technical, don't assume it is fine. Ask for an explanation in terms you understand. You can also research it by running it by people in your organization or on your board who know enough to tell if it sounds right.

Once you have interviewed the consultants, checked their references and seen their proposals, the bottom line is how you feel about them. Who can you work best with?

By carefully evaluating several candidates, you can be more confident that your consultant will be the best one for your organization. And by spending a little extra time in the selection process, you can help avoid a world of trouble later on.

Related resources:

- *Adopting Technology Interview with Denis Hayes.* Marc Osten and Rob Stuart (2001). A discussion about how the adoption of technology has helped the environmental movement in particular.
  http://www.techsoup.org/howto/articlepage.cfm?ArticleId=332&topicid=5

9. Resource list

Objective: *Provide easy access to more detailed articles, research and thinking about technology use in the voluntary sector.*

There are hundreds of resources available to help guide and inform individuals working in the voluntary sector with respect to the most efficient, cost-effective and useful ways to incorporate technology support in all aspects of technology planning and fundraising. In previous chapters, we have provided links to a number of the best resources related to specific topics – planning, grant writing, benchmarking. What follows is a list of some of the best general purpose not-for-profit technology reference web sites and support services.

Technology Reference Web Sites

- **Making IT Work for Volunteers** – Offers a comprehensive library of not-for-profit technology resources as well as an online partnership platform and a free tech support service. http://www.volunteersonline.ca

- **ItrainOnline** – A collaborative tech support portal for NGOs run by both Canadian and international organizations. Large numbers of practical how-to guides gathered from around the world. http://www.itrainonline.org

- **TechSoup** – Large tech portal providing support, advice and resources to not-for-profits. http://www.techsoup.org

Technology Support and Services

- **FirSTep** – Free technology support for Canadian not-for-profits. Operated by LEFCA, Ajilon and Making IT Work for Volunteers, FirSTep is a great opportunity for voluntary sector organisations to benefit from the advice of some of Canada's most respected IT consulting firms. http://www.volunteersonline.ca/modules.php?name=Content&pa=showpage&pid=94

- **reBoot** – Low cost computers and software for Canadian not-for-profits. Distributes refurbished computer hardware acquired through donation to not-for-profits, charities and those with limited access to technology. reBoot also provide training and technical support. http://www.rebootcanada.ca/

- **IM/IT Training and Technical Support Network.** This federally supported project will provide voluntary sector organizations with ongoing access to IT planning and expert advice, current hardware and software appropriate to their needs, training to keep up with technology, and technical support at the lowest possible rates. http://www.vsi-isbc.ca/eng/imit/program.cfm

- **Fifty Fabulous Free & Low Cost Nonprofit Friendly Web Resources**
  A collection of easy, inexpensive and quick technology resources for not-for-profits.
  http://www.summitcollaborative.com/lowhangfruit.html

TEMPLATE – Strategic Technology Plan

Overview

This section is intended to provide an overview of your organization and its strategic goals. It is also intended to make a link between your strategic goals and your technology goals.

About Our Organization

A quick description of what your organization does and who it serves. It might also include a copy of your mission statement.

Organizational Goals

A bullet list of the goals / objectives in your organization's current strategic plan. If you don't have a current strategic plan, a list of program areas and projects could be included here.

Technology Goals

Mapping the connection between your strategic goals and your tech goals. This can be done in table format as outlined in the following example:

Goals from strat plan	*Technology related goals*
Improve service to clients by making it easier for staff in all program areas to work together on client cases	Upgrade organizational database systems so that they can be used as an integrated case management system across all program areas
Increase number of past clients that stay connected to the organization as donors or volunteers	Create monthly e-newsletter that informs past clients of happenings and volunteer opportunities in our organization
And so on ...	

Technology Assessment

This section describes the current state of technology within your organization. It is based partially on answers to the 'technology capacity probe' questions outlined above in the toolkit.

Technology Assets

A bullet list or table describing where an organization has strengths and assets in terms of technology. Should include infrastructure, staff and volunteers, contractor relationships, databases and other internal systems, web sites and online systems.

Technology Gaps

A bullet list or table describing technology gaps. Using the 'capacity probes' will often help to surface these gaps.

Technology Infrastructure

This section should describe the infrastructure that an organization has – computers, internet connections, printers, etc.

Overview

Provide an overview of existing systems. For small organizations, all that is needed is a simple table like the one below.

Item	Description	Replacement
Desktop computers	Four desktop computers. All are P4 systems running Windows purchased in 2003	Replace in late 2005 with new machines. Consider moving to Linux at this time
Laptop computers	One laptop shared amongst all staff. Purchased in 2004	Replace in late 2006
Servers	None	None
Internet connection	Dedicated ADSL connection shared over the LAN	Ongoing cost
Printers	One black and white laser printer shared amongst all four computers	As needed
LAN	Local area network in place for all computers. Peer-to-peer network within office	Replace as needed. Consider wireless for guests next year
Add more as needed ...		

Additional information

Provide additional information about technology infrastructure needs. Questions to consider include:

- *How many staff need full-time computer access? How many additional computers are needed for part-time staff and volunteer computer access?*

- *How many locations does the organization have? Do all locations have a LAN, a printer and high speed Internet access?*

- *Are there areas where software upgrades and replacements are needed?*

- *What is the plan for providing technical support for staff and volunteers?*

Training and Support

This section describes the approach that will be taken to providing training and support within an organization. Issues and challenges to consider in this section include:

- *Providing ongoing training to deal with turnover of staff and volunteers.*

- *Defining baseline technology skill sets and a method for ensuring that relevant staff and volunteers have these skills.*

- *Creating a process for writing technology training objectives into staff members' personal development plans or other annual planning/evaluation processes.*

- *Accommodating different learning styles by offering access to different kinds of training – mentoring, mini-classes, formal classroom training, and self-paced online training. Most kinds of training can be found from outside training providers, which keep costs low and quality high.*

- *Promoting just-in-time learning by keeping a collection of up-to-date reference books and offering staff and volunteers a collection of technical support bookmarks that provide useful reference material.*

Web Site and Online

This section describes an organizations current and future web site and online strategy.

Audience

A brief profile of the main audiences that the organization is trying to reach online. Also include a description of the information and services that these audiences are seeking on the web site.

Web site description

An overview of the baseline functions needed to meet the needs of the audiences described above (e.g. a calendar of workshop dates or an e-newsletter). This can be done using a simple bullet list or table.

Web site upgrades

Description of new features and functions that need to be added to the web site in order to meet objectives outlined in the strategic tech goals section of the plan.

Web site marketing

Description of methods that are or will be used to regularly market and promote the web site.

Strategic Tech Projects

This section provides a list of strategic technology projects that an organization is envisioning during the period covered by the plan. Each project should include a short description, a budget estimate and information about how to get a full project plan.

Action Plan

This section provides a description of all the tasks required to implement your technology plan.

Name	Task	Due by
Alice	*Web site upgrades implemented*	*Q3 - 04*
Jim	*Computer replacement process undertaken.*	*Q4 - 05*

Technology Budget

This section provides a high level technology budget. To make things simple, just base the top line of this budget on the TCO calculations described in the Toolkit. An example is provided here:

Item	*2004*	*2005*	*2006*	*Notes*
Infrastructure and support	$12,000	$12,000	$12,000	Four people / workstations x TCO cost of $250/month per workstation
Web site – baseline	$5,000	$5,000	$5,000	Hosting and freelance webmaster
Web site - upgrades	$2,000	$0	$0	New e-newsletter system
Strat project – new database	$0	$12,000	$2,000	Implementation in 2005 and training in 2006
Total	*$19,000*	*$29,000*	*$19,000*	

TEMPLATE – Project Plan

Vision statement

A strategic technology plan should start with a big picture overview of what the project will produce (outputs or deliverables) and a list of the community or organizational impacts that it aims to have (outcomes).

Vision

A one paragraph description of the essence of the project. E.g. This project will use the web and e-mail to increase the number of youth we are able to engage as volunteers.

Project deliverables

A list of things that will be produced through the project – a web site, an online calendar, a database, e-mail lists, a collaborative online event. Each item in the list should include an annotation or description so that readers can understand what each of the deliverables will be used for.

Anticipated outcomes

A list of measurable objectives or community outcomes that will be achieved through the project. E.g. Increase number of youth volunteers by 25% in year one and 100% in year two.

Needs assessment

As with any initiative, a strategic technology project should be based on concrete, demonstrable needs. This section describes those needs.

Community profile

A brief description of who will benefit from your project. This may include: the community at large; clients your organization serves directly; or staff or volunteers.

Statement of need

A list of specific needs or desires that the beneficiaries have. E.g. Young volunteers need ways to contribute in a manner that fits better into their work and social patterns. Online virtual volunteering may help with this.

Research summary

A summary of the research that you did in order to develop your statement of need. This could include research that you did yourself (e.g. focus groups or online surveys) or research done by others (e.g. published studies and reports).

Project description

This section provides a rough picture of how the project will be implemented – the services to be built, the technology used, the people involved.

Functions and services

An overview of what will be built, written or otherwise created by the project team. Examples include: web site or other technology functions; training sessions; community development efforts; new or edited electronic content.

Technology approach

A description of the types of technology that will be used. This could be quite specific (e.g. the new online database will be built on top of our existing PHP and MySQL system) or just provide general principles (e.g. all tools used to develop this project should be open source).

Delivery approach

Information about how the project will be delivered. This should include: staffing roles; project management approach; project governance; list of partners and partner roles.

Marketing strategy

An overview of messages and techniques that will be used to market the project. Marketing should be thought of quite broadly as the process of letting people know about the initiative and getting them to use the systems put in place.

Action plan and budget

The plan should end off with an action plan and budget. For simpler projects, these two items can be combined into a single table something like this one:

Name	Task	Due by	Budget
Jim	Interview clients about their needs	February	Two weeks of Jim's time ($2000)
Eleanor	Research and interview technology vendors	March	One week of Eleanor's time ($1000)
Contractor	Build web site	April	$15,000
Eleanor	Manage contractors	April	One week of Eleanor's time ($1000)
Alice	Promote web site to clients	May	Two weeks of Alice's time ($2000)
Total			$21,000

Of course, a much more detailed action plan and budget is needed for larger projects. In these cases, the action plan and budget should be separate documents.